



IN
COLLABORATION
WITH

TROIKA
COMUNICAÇÃO · POLÍTICA · INTELIGÊNCIA

PREDICTIVE MODEL · INTEGRATED ANALYSIS · POLLS, SOCIAL MEDIA AND SIMULATION

2026 Elections · October 18 debate

Effects of political communication on the vote and the reception of the Band debate on social media and in the campaign mobilizations of Lula and Flávio

A study by IPSE Global in collaboration with Agência de Comunicação Troika. Drawing on a predictive model based on 84.9 million interactions and 344 million views in the debate window, classified by the Orikom® platform into 19 theoretical constructs from communication and political science, on focus groups followed in real time, and on simulations with 7.1 million virtual voters on the Tekoá® platform, the study estimates, for October 25, Lula at 49.4% of valid votes with a 41.5% chance of winning, and shows that the debate's effect on the vote depends on what each campaign's communication makes of it afterwards. On the night, Lula's camp dominated the conversation and won on evaluation, but his base traded hope for anger, and the following day Flávio's camp won the battle of the clips, while Lula's base partly resumed calls to vote. Those who shift by the 25th are mainly voters in the middle and those who voted for Flávio and for the other candidates, and those who return to vote are women and older people from the poorest base, while in the Bolsonarista camp Lula's communication arrives filtered through the opponent's circuits.

October 21, 2026

For October 25, the model estimates Lula at 49.4% of valid votes with a 41.5% chance of winning



Valid votes on Oct 25

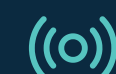
49.4% ×
50.6%

Lula and Flávio at the median of the 400,000 elections simulated in the main scenario. In 8 out of 10 of them, Lula falls between 46.1% and 52.8% of valid votes, a range that includes victory for either.

Lula's chance of winning

41.5%

In the main scenario, which adds to the polls the effect of communication measured on social media and propagated through the synthetic population. Without the context effect, at the lower bound, the chance is 35.8%.



A model of political communication

7.1
million

virtual voters on Tekoá® receive the political communication measured by Orikom®. The polls are the starting point, and it is communication that moves the projection through the 25th.

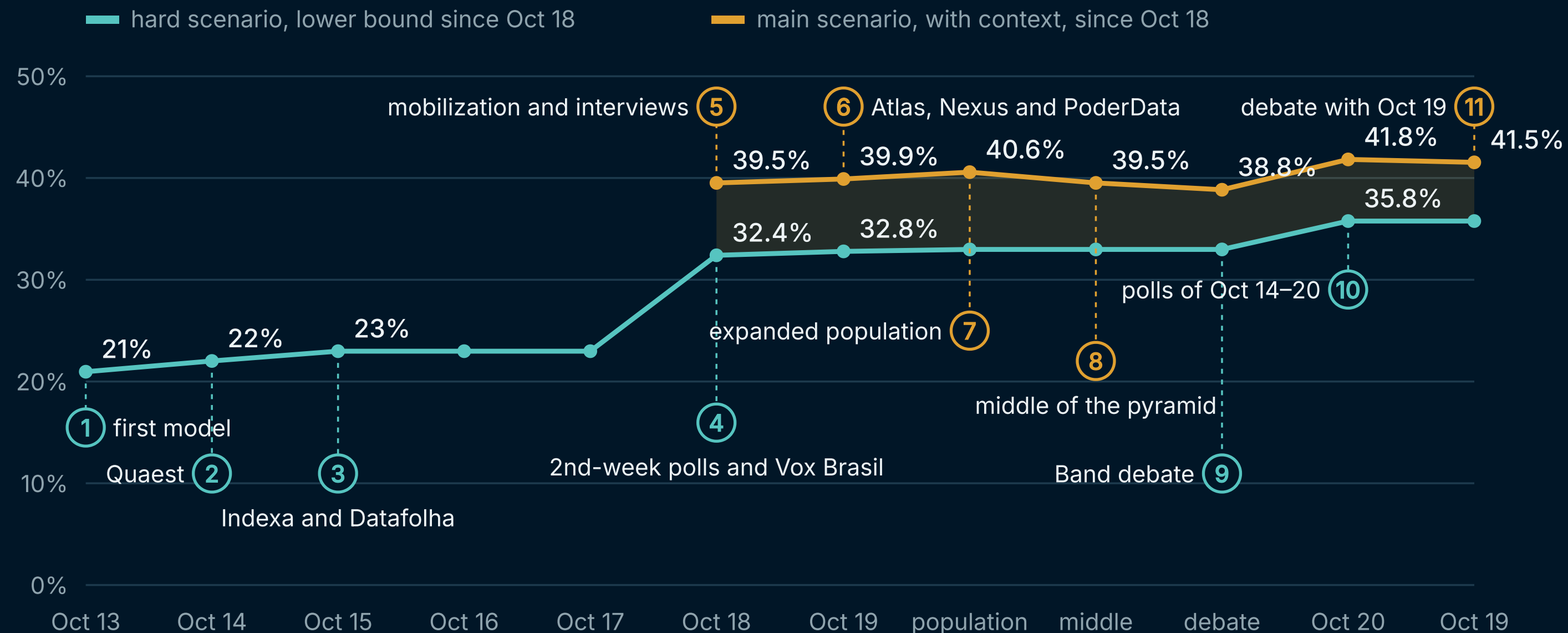


The model is predictive and driven by political communication, not by polls alone

Polls measure where voters stood during fieldwork, which ends three to four days before each estimate. The model starts from them and projects the 25th with what political communication does in the interval, each camp's reach on social media and TV, and the reception, emotions and calls to vote measured by Orikom®, propagated through the Tekoá® synthetic population. It represents all 514,070 polling stations in the country and their 157.8 million voters with 7.1 million virtual voters, one for every 10 voters in the 179,000 polling stations of the large urban concentrations and one for every 100 in the 335,000 polling stations in the rest of the country, each with the profile and actual first-round vote of their polling station.

Each scenario runs 2,000 times, and in each run reach, persuasion and mobilization are drawn from the ranges in the literature and the measurements. The 2,000 runs feed 400,000 possible elections, which add the historical polling error. The main estimate is the scenario with the context, the only one that incorporates measured communication, and the hard scenario, in which the campaigns cancel each other out, is the lower bound. The forecast was registered before the polls with fieldwork after the debate, so that it can be checked against them and, on the 25th, against the ballot box.

In one week, Lula's chance rose from 21% to 41.5% in the main scenario



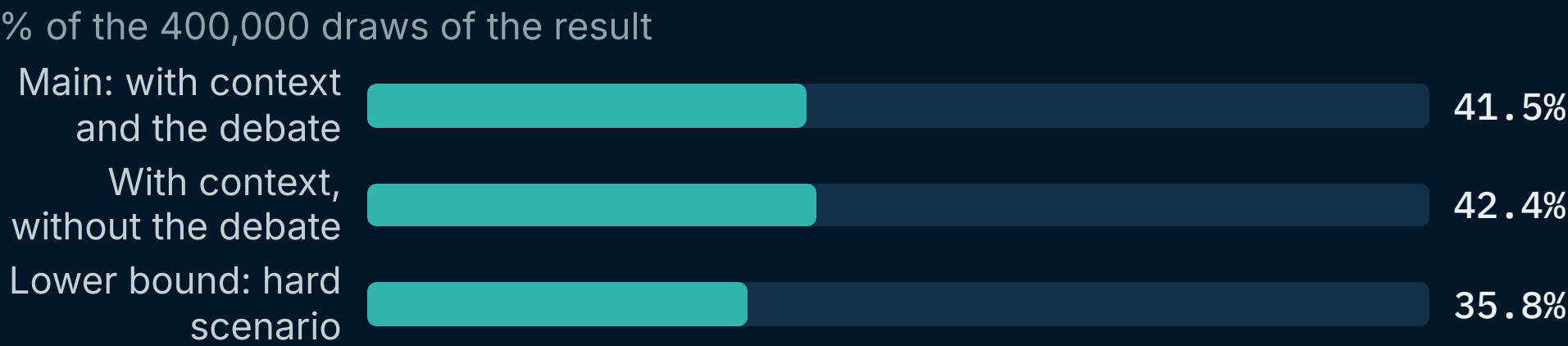
Lula's chance of winning the runoff as estimated by IPSE Global, with Orikom® and Tekoá®, on each date, in % of simulations. The numbers refer to the next slide.

Polls and base mobilization explain almost all of the rise

	WHEN	CHANCE	WHAT CHANGED
1	Oct 13	21%	First application of the model, with ten polls and Flávio 4.4 points ahead in valid votes.
2	Oct 14	22%	Genial/Quaest (Oct 10–13), with Lula at 49% of valid votes, narrows the gap to 4.2 points.
3	Oct 15	23%	Indexa and Datafolha (Oct 13 and 14) bring the gap to 3.9 points.
4	Oct 18	32%	Second-week-only average, with Lula at 48.8% rather than 47.9% (+7), and Vox Brasil, at 51% (+2.5).
5	Oct 18	39%	Scenario with context: mobilization of Lula's base and interviews on TV Globo (+7).
6	Oct 19	33% to 40%	AtlasIntel/Bloomberg, BTG/Nexus and PoderData, with fieldwork through Oct 18, keep the average at 48.9%.
7	Oct 19	33% to 40.6%	Synthetic population of 7.1 million agents, 2,000 runs and 400,000 draws of the result (+0.7).
8	Oct 19	33% to 39.5%	Middle of the pyramid: the self-employed and those earning 2 to 5 minimum wages are less open to Lula (−1.1).
9	Oct 19	33% to 38.8%	Band debate: better evaluation of Lula, outweighed by the drop in hope among his base (−0.7).
10	Oct 20	35.8% to 41.8%	DataTrends, Futura, Real Time Big Data, Alfa and Instituto França bring the average to 49.1% (+3.0).
11	Oct 20	35.8% to 41.5%	Debate reread with Oct 19: a larger evaluation advantage and a base that resumes calls to vote (−0.3).

On the night, the debate barely moved Lula's chance, and what remains depends on communication afterwards

Lula's chance of winning the runoff, estimated on October 20



WHAT THE MODEL TAKES INTO ACCOUNT

Polls	the average of national polls with fieldwork completed in the previous seven days, 17 as of Oct 20, with the historical error of runoff polls, 2.5 points nationally and 1.5 in each region
Actual vote	each region's first-round vote, from the TSE, and the shift of other candidates' voters to Lula, Flávio or blank and null, calibrated by regional polls and by inference at the polling stations
Communication	the effect of the campaigns through the 25th in the synthetic population, with the reach measured by Orikom®, TV, conversation among neighbors, forgetting and turnout
Context	the mobilization of Lula's base, the interviews, the reaction of Flávio's camp, the debate and the middle of the pyramid, each with an explicit range and the same draws

400,000 POSSIBLE ELECTIONS

Lula's chance of winning across 400,000 draws, based on the average of 17 polls from October 14–20 (Lula at 49.1% of valid votes) and on the effect of communication in the Tekoá® synthetic population.

THE NET EFFECT OF THE DEBATE IN THE SIMULATION

The debate enters as exposure for 12% to 25% of the electorate, with an effect proportional to the measured evaluation advantage, and as a loss of energy in Lula's base from October 19 onward, calibrated between the drop in hope and the partial recovery of calls to vote in his camp. The second effect outweighs the first, and the net result is –0.9 point, from 42.4% to 41.5% in the main scenario.

CHANCE IS NOT A SCORE FORECAST

The debate does not end on the night. What it is worth depends on the clips and interpretations that circulate, and since then the chance has risen from 38.8% to 41.5%, mainly with the new polls.

— SUMMARY the projection, with its uncertainty

There is a tight statistical tie. Lula has improved his chances, but the simulations still give Flávio the win today

How to read: each draw is a possible election, built from the average of the 17 polls, their historical error and the campaign's effect in the synthetic population. It is not a score forecast. What matters is in how many of these elections each candidate wins and by how much. At the center of the distribution, Lula has 49.4% and Flávio 50.6% of valid votes, a difference smaller than the polling error, which is why the picture is a statistical tie, with Flávio winning in most of the simulated elections.

FLÁVIO WINS

58.5% of draws

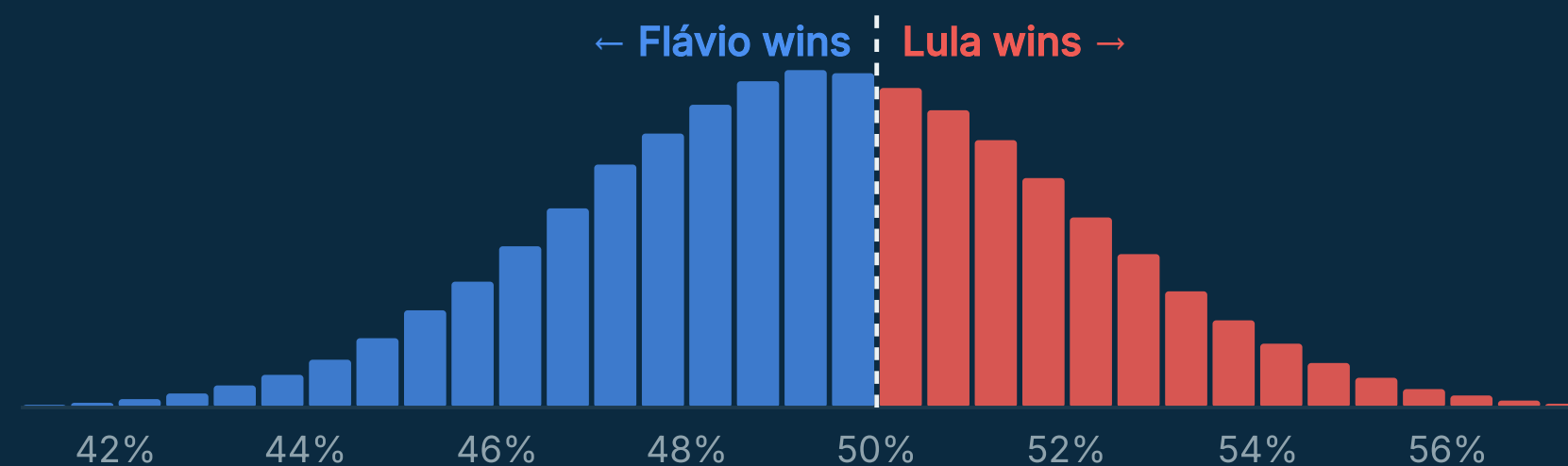
When Flávio wins, the typical result is **52.0%** of valid votes, and in 8 out of 10 of these wins it falls between 50.4% and 54.7%. In the hard scenario, Flávio wins in 64.2% of draws.

LULA WINS

41.5% of draws

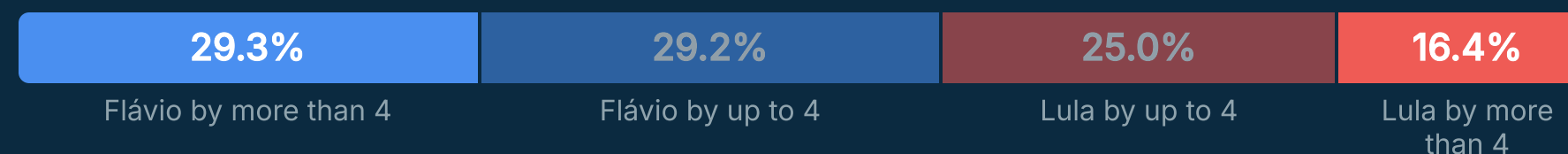
When Lula wins, the typical result is **51.6%** of valid votes, and in 8 out of 10 of these wins it falls between 50.3% and 54.0%. In the hard scenario, Lula wins in 35.8% of draws.

The 400,000 draws, main scenario, with context and the debate



Lula's valid votes in each draw, in half-point bands (the remainder is Flávio's)

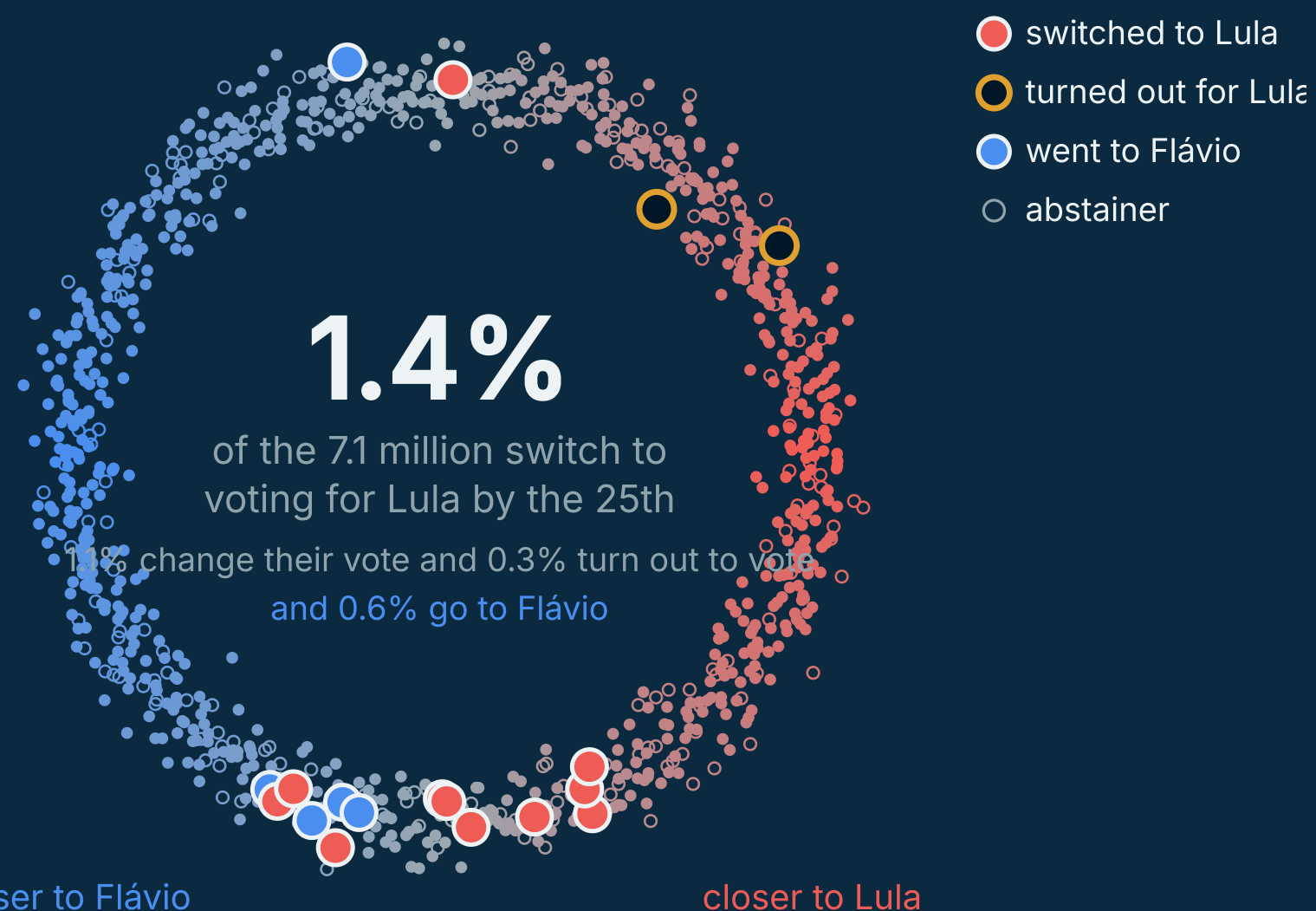
By how much each wins, in points of difference in valid votes



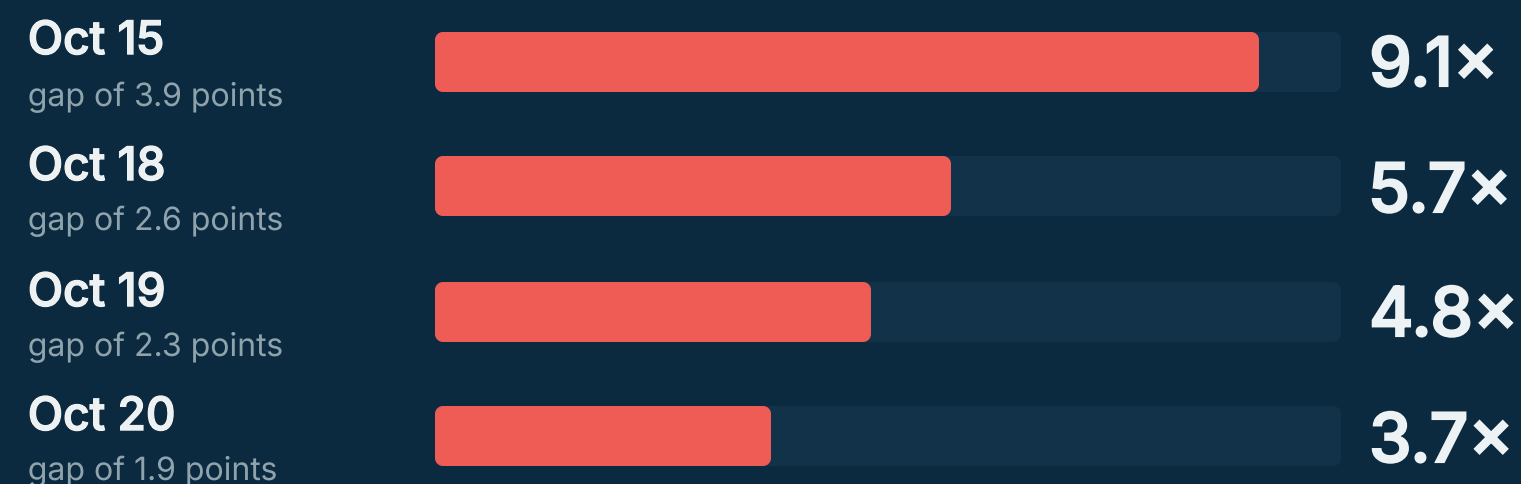
400,000 draws of the result from Tekoá®, IPSE Global, with social media data from Orikom®; average of 17 polls with fieldwork Oct 14–20 (Lula at 49.1% of valid votes).

The comeback campaign is on the right track, but needs to nearly quadruple its reach

The 7.1 million virtual voters, as one thousand points drawn in the same proportions and ordered by predisposition, in a typical run of the current scenario



REACH NEEDED FOR A COMEBACK THROUGH COMMUNICATION ALONE
times the daily views of Lula's camp measured Oct 9–15, median of 20,000 funnel simulations



The multiplier fell from 9 to under 4 because the polls narrowed the gap to be closed, not because measured reach grew. In the network of virtual voters, with conversation among neighbors, mobilization and Flávio's reaction, communication yields about 0.5 point through the 25th, more than half of what is missing, with 1.1% of the electorate switching to Lula, 0.3% turning out to vote and 0.6% going to Flávio.

Tekoá® simulations, IPSE Global, with reach measured by Orikom®; 80% range from 1.3× to 11.7× on Oct 20

Those who shift by the 25th are mainly voters in the middle and those who voted for Flávio and the other candidates

SEGMENT	SHARE OF THE ELECTORATE	SWITCHES TO LULA, PER THOUSAND	URNS OUT FOR LULA, PER THOUSAND	GOES TO FLÁVIO, PER THOUSAND
Voted for Flávio in the first round	35%	18.8	0.0	0.0
Voted for the other candidates	6%	26.2	0.0	10.9
Voted blank or null	4%	25.2	0.0	10.3
Did not vote in the first round	21%	6.0	8.2	2.5
Voted for Lula in the first round	34%	0.0	0.0	8.5
Northeast	28%	13.9	2.7	3.2
South	14%	8.1	0.9	5.6
Entire electorate	100%	10.5	1.7	4.5



Communication moves those in the middle and those with an activist nearby, and the cost of living is the issue that weighs most in the focus groups

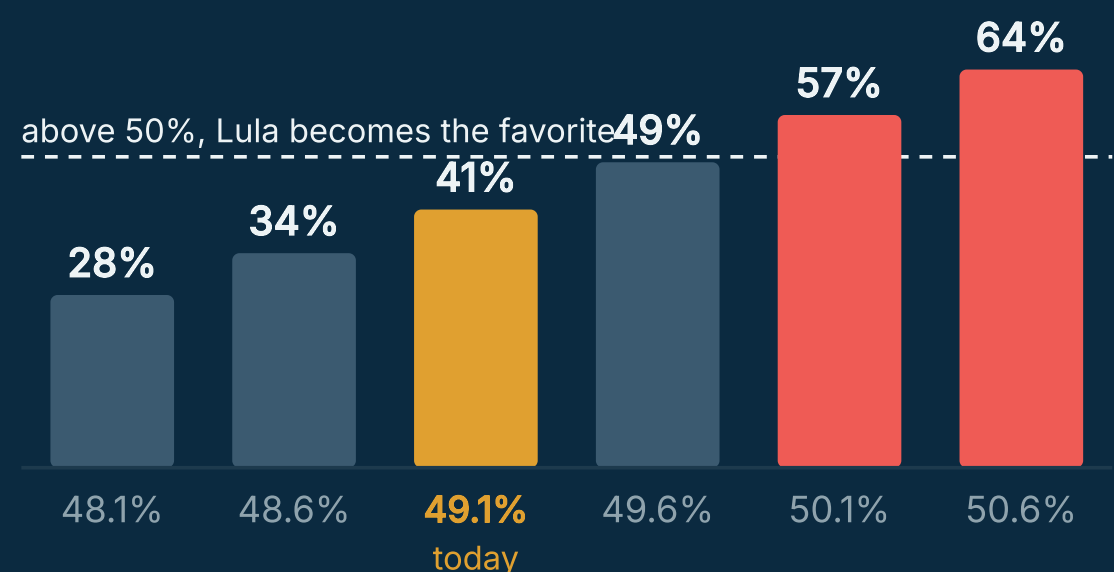
In the simulation, 57% of those who switch to Lula and 59% of those who go to Flávio are in the middle of the predisposition scale, where acceptance of a message is highest. 63% of Lula's gain comes from those who voted for Flávio in the first round and 15% from those who voted for the other candidates. The Northeast accounts for 37% of the switches to Lula and only 20% of the losses, and those who return to vote for Lula are mainly women (74%), aged 60 or over (36%) and with at most primary education (50%), the base that holds the abstainers leaning toward Lula.

The system's focus groups, with more than 500 participants, show why. Among those who voted for Bolsonaro in 2022, those in the Northeast are the most open to changing their minds and the least negative about Lula, and those earning 2 to 5 minimum wages, the middle of the pyramid where Lula loses most, are the most closed and the most favorable to Flávio. The cost of living is the issue with the most negative sign across all profiles, especially among women aged 60 or over, who are also the most open to change. Among Bolsonaro voters, hope in Lula is not negative but absent, and that is the space communication can occupy.

What could move the chance of a comeback through the 25th

1 • POLLS WITH FIELDWORK AFTER THE DEBATE

Lula's chance of a comeback according to the poll average in valid votes, all else equal



Half a point more in the average raises the chance from 41% to 49%, and one point more makes Lula the favorite, at 57%. Half a point less brings it down to 34%.



2 • The debate clips

What to watch. which excerpts circulate on social networks and WhatsApp, and whether they come from the first-block confrontation or from the record in government

Why. most of the electorate will get to know the debate through these excerpts, and on Oct 19 those from Flávio's camp already outnumbered Lula's



3 • The energy of Lula's base

What to watch. whether hope in Lula's camp, now at 18%, rises again, and whether calls to vote, already at 37%, recover the 44% seen before the debate

Why. the loss of this energy is what explains the debate's net effect of -0.9 point in the simulations



4 • The TV Globo debate, on Oct 23

What to watch. audience, each candidate's evaluation among undecided voters, and what becomes a clip

Why. it is the last mass exposure before the vote, when the effect has not yet dissipated



5 • The middle of the pyramid

What to watch. the vote of the self-employed and of those earning 2 to 5 minimum wages in the polls

Why. this is where Flávio opened a lead in the final stretch of the first round and where the simulation loses the most votes for Lula



6 • Reach on the platforms

What to watch. compliance with the TSE decision ordering Meta to treat both candidacies identically

Why. the communication funnel would already need to be almost four times larger to produce a comeback on its own

The most contested are voters in the middle and those of the other candidates, and Lula loses most in the South, among evangelicals and the self-employed

SEGMENT	SWITCHES TO LULA, PER THOUSAND	GOES TO FLÁVIO, PER THOUSAND	NET FOR LULA, PER THOUSAND	SHARE OF LULA'S LOSSES
Predisposition in the middle of the scale	33.1	14.5	18.6	59%
Voted for the other candidates	26.2	10.9	15.2	15%
Voted blank or null	25.2	10.3	14.8	9%
Northeast	13.9	3.2	13.4	20%
Self-employed	9.4	5.5	5.1	21%
Income of 2 to 5 minimum wages	9.7	5.2	5.8	40%
Evangelicals	8.8	5.0	4.4	30%
South	8.1	5.6	3.4	18%

The win on stage and the base's loss of energy coexist, and the net result depends on communication in the following days

The results suggest that the debate produced, at the same time, an evaluation advantage for Lula and an unfavorable shift in the emotional register of his base. The advantage appears in evaluations inside and outside his camp and in the focus groups, and the shift appears in the drop in hope, pride and loyalty as virtue, in the rise of indignation and contempt, and in fewer calls to vote. Because Lula's base had been sustained by enthusiasm, the change of register weighs more on it than on Flávio's, which was already combative before the debate.

The following day confirmed and qualified this picture, because Lula's evaluation improved further, including in neutral posts, and calls to vote partly recovered, but hope did not return, anger grew, and the most widely circulated clips came to be those of Flávio's camp. This mechanism is consistent with the comparative literature, which finds null or small average effects of debates on the vote (LE PENNEC; PONS, 2023), and with the idea that subsequent interpretation counts as much as performance (FRIDKIN et al., 2007). What this study adds is the measurement, on social media, of how reception splits into an evaluative layer, favorable to Lula, and an affective and mobilizing layer, unfavorable to him, and the translation of both into a simulated effect on the chance of a comeback.



The demand for transparency opens to Lula's camp a language that can speak beyond the base

The rise of accountability and transparency in Lula's camp, driven by the secrecy challenge at the end of the debate, shifts the corruption charge from a partisan register to a republican one, which invokes common rules and not only the opponent. This shift matters because responsibility frames and shared-values frames tend to circulate better among non-aligned audiences than personal attacks.

At the same time, the narrative structure of the two camps is symmetrical, with the opponent as aggressor and the people as victim, and moderate polarization came to predominate. In this configuration, reception tends to reinforce bases rather than convert, which is consistent with the small effect estimated in the simulation and with the persisting statistical tie.

The sources used to read this debate, from the stage to social networks, on the same timeline

Sources used to read this debate. The full model also uses the vote at the 514,000 polling stations, polls by segment and the system's focus groups.

Social media

ORIKOM®

26.8 million

interactions and 60 million live views, with the highest-reach posts and a random sample read by the model

Synthetic population

TEKOÁ®

7.1 million

virtual voters reproducing the profile and vote of the country's 514,000 polling stations

Broadcast chat

IPSE GLOBAL

143.7 thousand

messages in the full replay, without authors, with side and tone read by the model

Paid messages

IPSE GLOBAL

R\$33.6 thousand

in 3,387 paid chat messages, read one by one, with their amounts

Google searches

IPSE GLOBAL

133 min

of minute-by-minute interest in Lula, Flávio and the debate, and the rising searches

Focus groups

TROIKA AND IPSE GLOBAL

24

voters in three groups who followed this debate, statement by statement, from a system with more than 500 focus group participants

Voting intention polls

POLLING FIRMS

17

national polls with fieldwork Oct 14–20, three of them with part of the fieldwork after the debate

Simulations

TEKOÁ®

400,000

draws of the result, over 2,000 runs per scenario in the synthetic population of 7.1 million agents

Audience

KANTAR IBOPE AND YOUTUBE

31.6 million

YouTube views and the preliminary TV audience measurement

The debate reached tens of millions, live and afterwards, on TV, YouTube and social networks

Free-to-air TV

LIVE

13 points

Band's average in Greater São Paulo, about 2.6 million people there alone, ahead of Globo

AFTERWARDS

—

the consolidated audience measurement has not yet been released

WHO WATCHES

Watching only live is the habit of 58% of voters aged 60+, 59% of those earning up to 1 minimum wage and 55% of those with primary education at most.

Kantar Ibope, preliminary, press on Oct 19 (1 point = 199,600 people); profile: Nexus, Aug 14–16, 2026

YouTube

LIVE

5.4 million

simultaneous connections at the 21:30 peak, worth almost 8 national TV points if counted as people

AFTERWARDS

31.6 million

views of Band's broadcast on Oct 19, with 718 thousand likes

WHO WATCHES

Live and in clips, the habit of 40% of those aged 16 to 24 and 41% of college graduates; 10% of the young watch only clips.

YouTube, Band's channel; peak reported by the press on Oct 19; profile: Nexus, Aug 14–16, 2026

Social media

LIVE

26.8 million

interactions and 60 million views on posts about the election between 20:00 and 22:15

AFTERWARDS

59%

of interactions about the debate after it ended went to the secrecy challenge

social media data from Orikom®, IPSE Global

Searches

LIVE

7×

the normal level of searches for Lula at the peak, at 20:55, against low and stable interest in Flávio

AFTERWARDS

rising

who is doing better in the debate, what Flávio did as a senator, and the Ana Clara case

Google Trends, Brazil, minute by minute, IPSE Global

A study of how the Band debate was received on social media and what it may change in the vote

Question

reception

How was the Band presidential debate of October 18, 2026, received on social media, with which emotions, moral foundations, values and frames, and what is its likely effect on Lula's chance of a comeback in the runoff?

Interactions

84.9 million

Interactions in the electoral conversation classified by the Orikom® platform in the debate window, with 344 million views, compared with a baseline of October 15–18 and cross-referenced with focus groups, searches, chat, audience and 17 polls.

Constructs

19

Classification of each post into 19 theoretical constructs, independent reading of the political camp, interaction-weighted proportions with bootstrap intervals, and simulation in the Tekoá® synthetic population, with 7.1 million virtual voters.

The debate gave Lula's camp most of the conversation, but traded hope for indignation and contempt



Reach

43% → 53%

The share of Lula's camp in interactions about the election rose from 43% at baseline to 53% in the debate window, and that of Flávio's camp fell from 45% to 30%.

Hope in Lula's camp

48% → 20%

In Lula's camp, hope fell 28 points, giving way to indignation and contempt; in Flávio's, contempt grew 13 points. The debate traded the horizon for confrontation.



Accountability

+30
points

Lula's camp moved from strategic contest to attribution of responsibility, moral corruption and demands for transparency, with the secrecy challenge; Flávio's moved to spectacle and the defense of order.

— SUMMARY the following day

On the following day, Flávio's camp regained ground and won the battle of the clips, and Lula's base resumed calls to vote

Share of Lula's camp

55% → 51%

Lula's camp gathered 55% of interactions about the election on the night of the debate and 51% on October 19, and Flávio's rose from 27% to 33%, pulling ahead in several hours of the day.

Clips from Flávio's camp,
in millions

0.1 → 0.8

Clips from Flávio's camp went from 0.1 million interactions on the night of the debate to 0.8 million on October 19, surpassing Lula's, which went from 0.6 to 0.5 million.



Calls to vote in Lula's camp

20% → 37%

Calls to vote, which had fallen from 44% to 20% on the night of the debate, returned to 37% the following day, but hope stayed at 18% and anger reached 52%.

On the night, the base's loss of energy outweighed Lula's evaluation gain, a balance that communication can still change



Simulated effect

**-0.9
point**

In the simulation, the chance goes from 42.4% to 41.5% with the debate. The evaluation gain weighs less than the loss of energy in the base, which traded hope for anger.

Overall picture

**21% →
41.5%**

Lula's chance of a comeback practically doubled from October 13 to 20, mainly due to the polls and base mobilization, and the race is in a statistical tie, with Flávio winning in most of the simulated elections.

Contribution

≠

Debates rarely move the vote on the night. What matters is what circulates afterwards, and here the win on stage ran up against the shift in the base's emotional register.

The study compares the debate window, with 84.9 million interactions, with a baseline of three and a half days

WINDOW	PERIOD (BRASÍLIA TIME)	INTERACTIONS	VIEWS
Baseline (read)	Oct 15 0:00 to Oct 18 19:00	114.4 million	355.3 million
Debate	Oct 18 19:00 to Oct 19 24:00	84.9 million	344 million
night of the debate	Oct 18 19:00 to 24:00	46.5 million	202.6 million
following day	Oct 19 0:00 to 24:00	38.4 million	141.3 million
of which about the debate	Oct 18 19:00 to Oct 19 24:00	27.5 million	172 million
Lula's camp, on the debate		45.3 million	124.9 million
Flávio's camp, on the debate		25.2 million	82.9 million

Each post was classified into 19 constructs and read separately for political camp

Constructs

19

Orikom® classifies each post with a language model (DeepSeek, temperature zero, no extended reasoning), in a single questionnaire of 19 constructs with closed vocabulary and an applicability layer, which separates an absent construct from a negated one.



Political camp

4 camps

Because Orikom® codes stance toward the issue rather than the candidate, each post's camp (Lula, Flávio, third party or neutral) and the evaluation of debate performance were read separately, with a dedicated questionnaire, across all posts in the debate window.



Minimization

LGPD

Only the text of the post is sent to the model, without author, profile, metrics or address, which reduces author-attribution bias and complies with the LGPD data minimization principle. Results are published only in aggregate form.

Each proportion indicates how much of the public's attention went through posts with that feature

All proportions in the study are the share of interactions (likes, comments and shares) that fell on posts with a given feature, within each camp and each window. Weighting approximates public exposure rather than profile output, but makes the results sensitive to the highest-reach posts, since in the debate window the top 1% by reach concentrates almost half of the interactions.

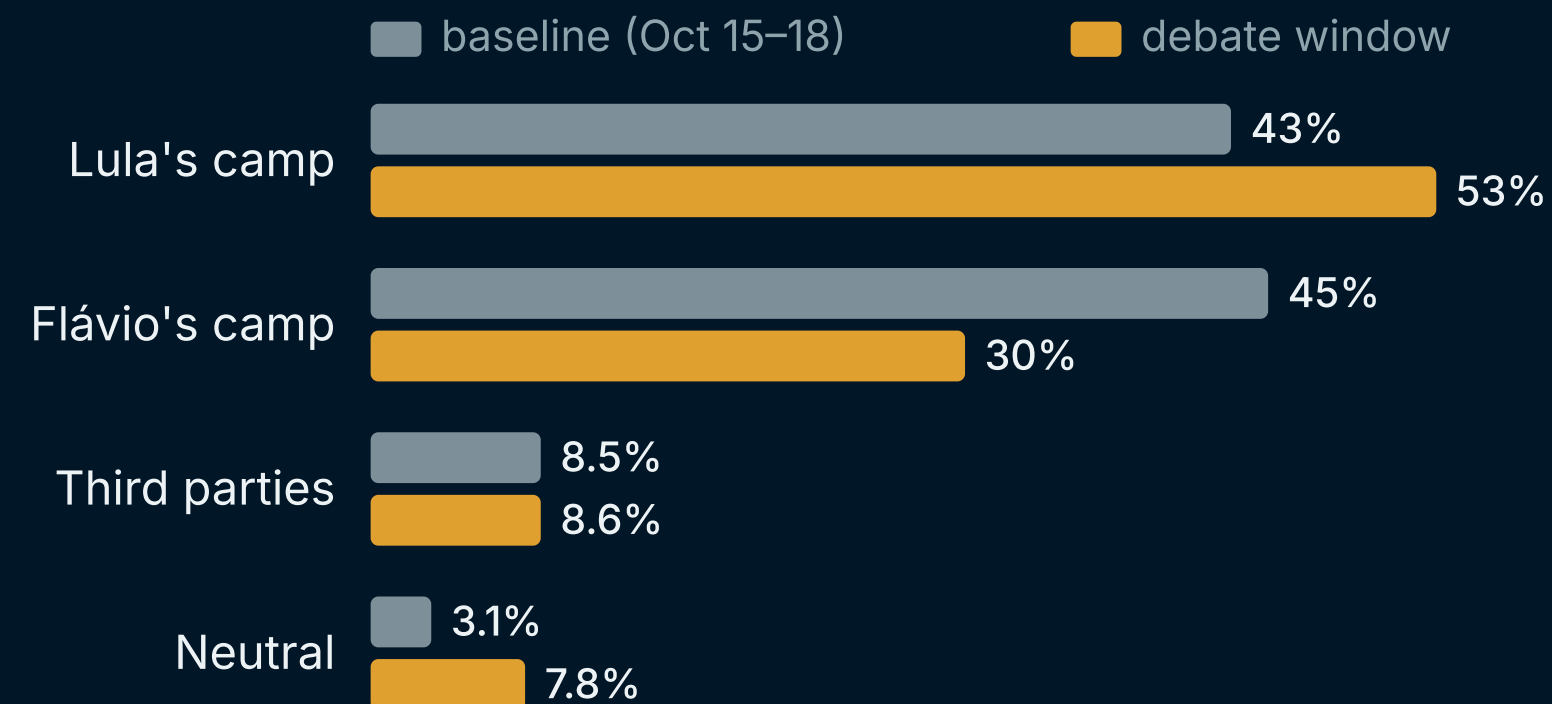
For this reason, each proportion comes with a 95% interval obtained from 1,000 resamples of the posts (bootstrap), and comparisons between the debate window and the baseline use the difference with its own interval. Differences whose interval includes zero are treated as indistinguishable. Unweighted per-post proportions point in the same direction. The methodological appendix, at the end of the document, details the corpus, the instrument, the equations for estimation and for the simulation models, the meaning of each symbol and the source of each parameter.

— REACH the conversation by camp

In the debate window, Lula's camp came to account for 53% of interactions about the election

Share of interactions about the election, by camp

% of interactions; 95% intervals in the adjacent text



WHO TALKED ABOUT WHAT

The share of interactions and views about the election attributable to posts from each camp, at baseline and in the debate window, with 95% bootstrap intervals.

HOW THE CONVERSATION WAS DIVIDED

Lula's camp went from 43% (95% CI: 38–48%) to 53% (47–60%) of interactions, and Flávio's fell from 45% to 30%. Neutral posts, mainly from the press, doubled in weight.

WHY REACH IS NOT SUPPORT

The debate did not balance the conversation but shifted it toward the camp that already dominated it before the first round. Reach, however, is not support, and the literature indicates that the interpretation that circulates counts more than volume.

— REACH the conversation hour by hour

Lula's camp dominated the night of the debate, and the following day Flávio's pulled ahead in several hours

Interactions per hour, by camp

logarithmic scale; Brasília time, from 19:00 on Oct 18 to midnight on Oct 19



WHY THE LOGARITHMIC SCALE

Interactions per hour on posts about the election, by camp. On the logarithmic scale, each gridline is worth ten times the previous one, so that low-activity hours appear at their actual value.

THE PACE OF THE NIGHT AND THE FOLLOWING DAY

Lula's camp led every hour of the broadcast, with 8.4 million interactions at 21:00 and 7.8 million at 22:00, and Flávio's peaked at 21:00, with 4.6 million. Overnight, interactions fall to tens of thousands per hour, and over the course of October 19 Flávio's camp surpassed Lula's in 8 of the 24 hours, overnight, mid-morning, in the afternoon and at 21:00.

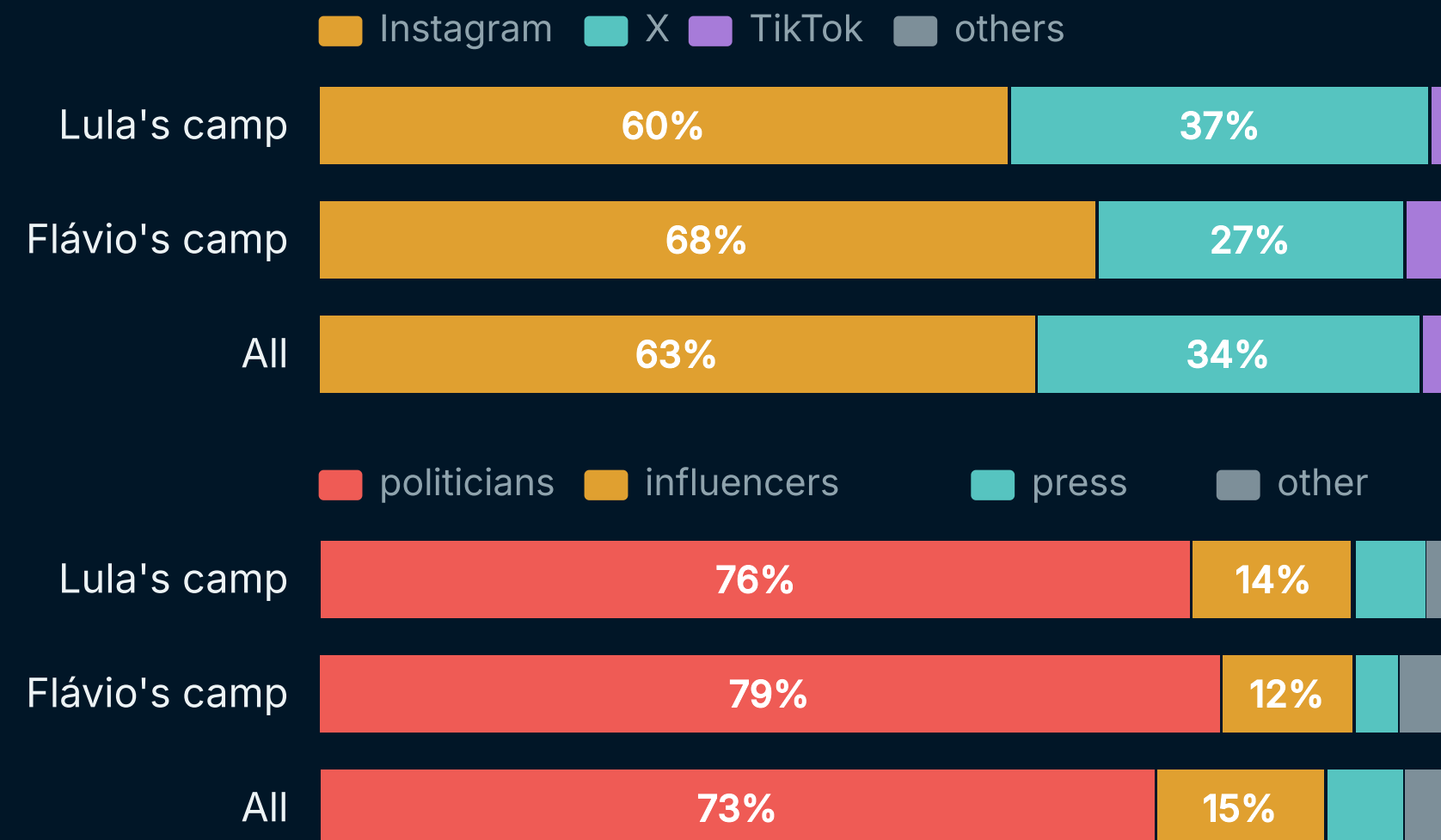
NO HOUR WITHOUT CONVERSATION

Every hour has collected posts, and no series reaches zero. The lowest value, for neutral and third parties at 3:00 on Oct 19, is 94 interactions. October 20 is excluded, as its metrics are still accumulating.

Reception ran mainly through Instagram and politicians' profiles

Interactions by platform and by author type

% of interactions in the debate window



WHERE RECEPTION TOOK PLACE

The share of interactions in the debate window by platform and by author type, in each camp.

EACH NETWORK, AN AUDIENCE

Instagram accounted for 63% of interactions and X for 34%. Politicians' profiles concentrated 73% of interactions, influencers 15% and press outlets 7%.

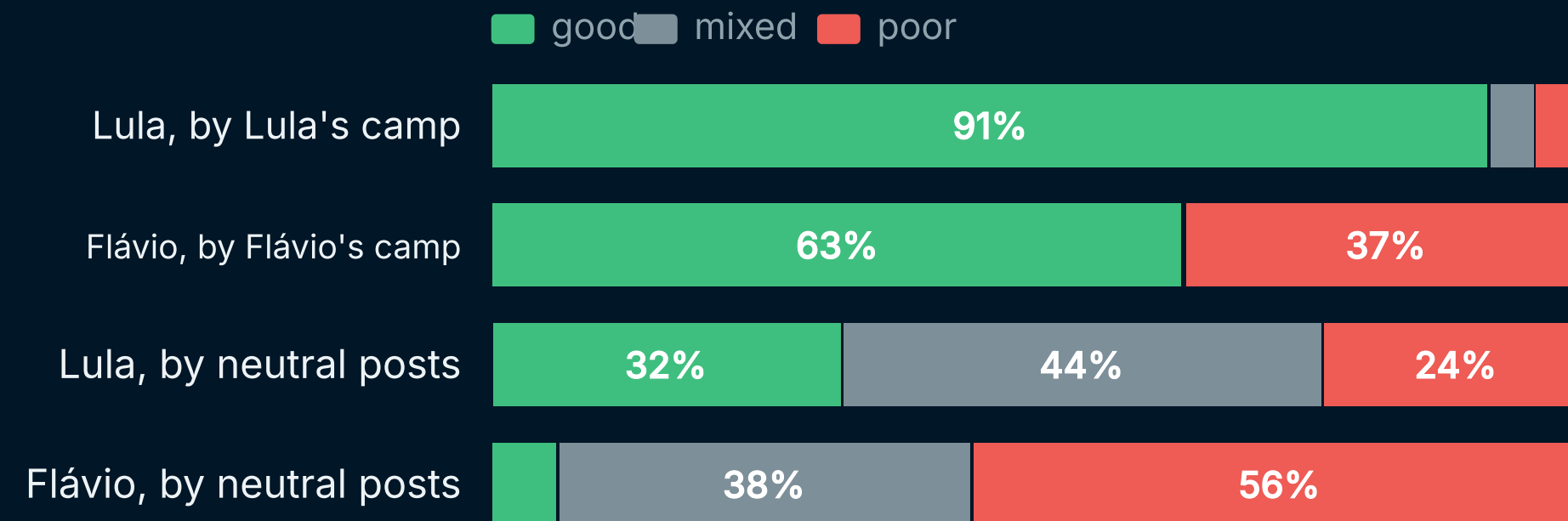
WHAT THIS SAYS ABOUT RECEPTION

The interpretation of the debate on social networks was produced mainly by the political actors themselves and their allies, which brings the reception measured here closer to the narrative contest between the camps than to the spontaneous reaction of ordinary voters.

Each camp approved of its own candidate, but Lula's did so with greater conviction

Evaluation of debate performance

among posts that evaluate the candidate, % of interactions; each row sums to 100%



GOOD, MIXED OR POOR

Among posts that evaluate a candidate's debate performance, the share of interactions with a good, mixed or poor evaluation, by camp.

EACH CANDIDATE'S NET RATING

Lula's camp rated his performance well, with almost no reservations, while in Flávio's camp the ratings of its own candidate were more divided. Among neutral posts, Lula was rated better than Flávio.

THE ADVANTAGE THAT ENTERS THE MODEL

Lula's rating advantage appears on social media and in the focus groups followed in real time, but it is small outside the camps, and it therefore enters the simulation as a moderate effect.

The reaction concentrated on the confrontation in the first segment

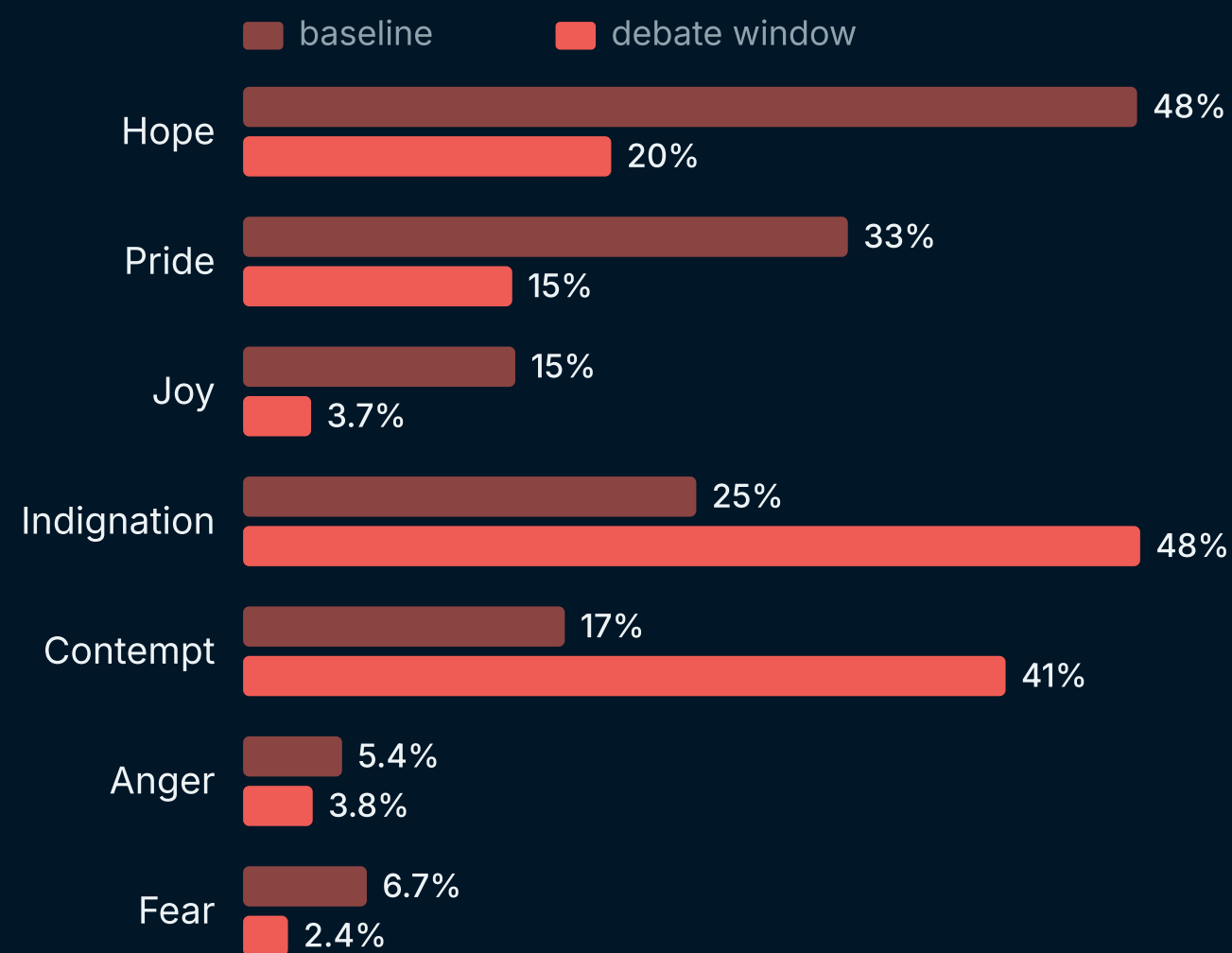


No band is a sample of the electorate. The numbers mark the moments of strongest reaction.

In Lula's camp, hope and pride gave way to indignation and contempt

Emotions in Lula's camp

% of interactions on posts with each emotion



TEN EMOTIONS IN CONTENTION

The share of interactions in Lula's camp on posts with each emotion, in the baseline and in the debate window. A post may carry more than one emotion.

FROM HOPE TO INDIGNATION

Hope fell from 48% to 20%, a difference of -28 points (95% CI: -41 to -14), and pride, -18 points (95% CI: -28 to -8). Indignation rose +24 points (95% CI: +11 to +35) and contempt, +24 points (95% CI: +12 to +36).

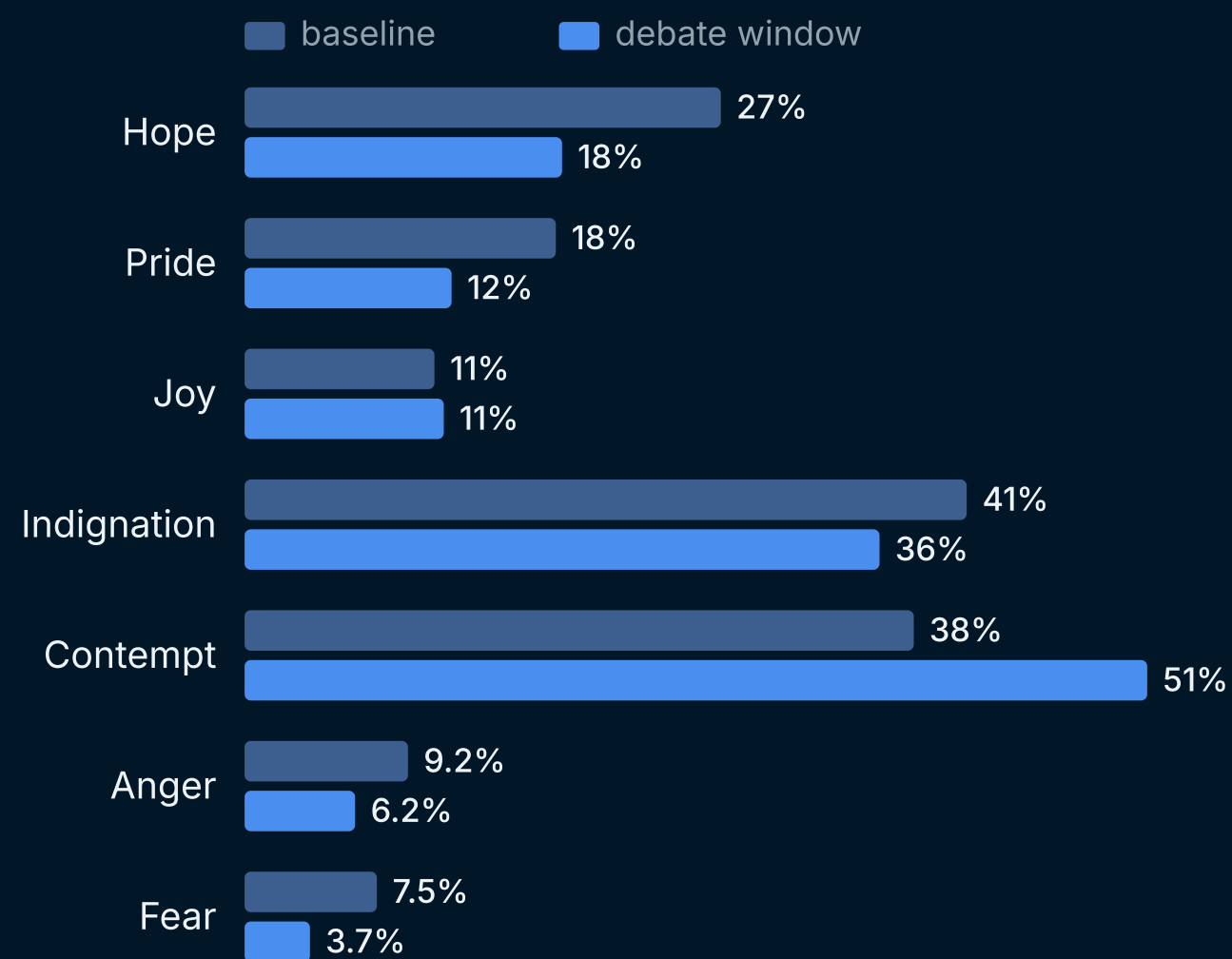
WHAT THIS DOES TO THE BASE

In affective intelligence theory, enthusiasm sustains participation and loyalty, and anger reinforces predispositions. The shift in register suggests a more combative and less enthusiastic base, which weighs on turnout.

In Flávio's camp, contempt grew and hope also receded

Emotions in Flávio's camp

% of interactions on posts with each emotion



THE REGISTER OF AN ALREADY COMBATIVE CAMP

The share of interactions in Flávio's camp on posts with each emotion, in the baseline and in the debate window.

CONTEMPT UP, THE REST STABLE

Contempt rose +13 points (95% CI: +1 to +24) and hope fell from 27% to 18%, -9 points (95% CI: -19 to +2). Indignation did not change distinguishably.

THE DIFFERENCE FROM LULA

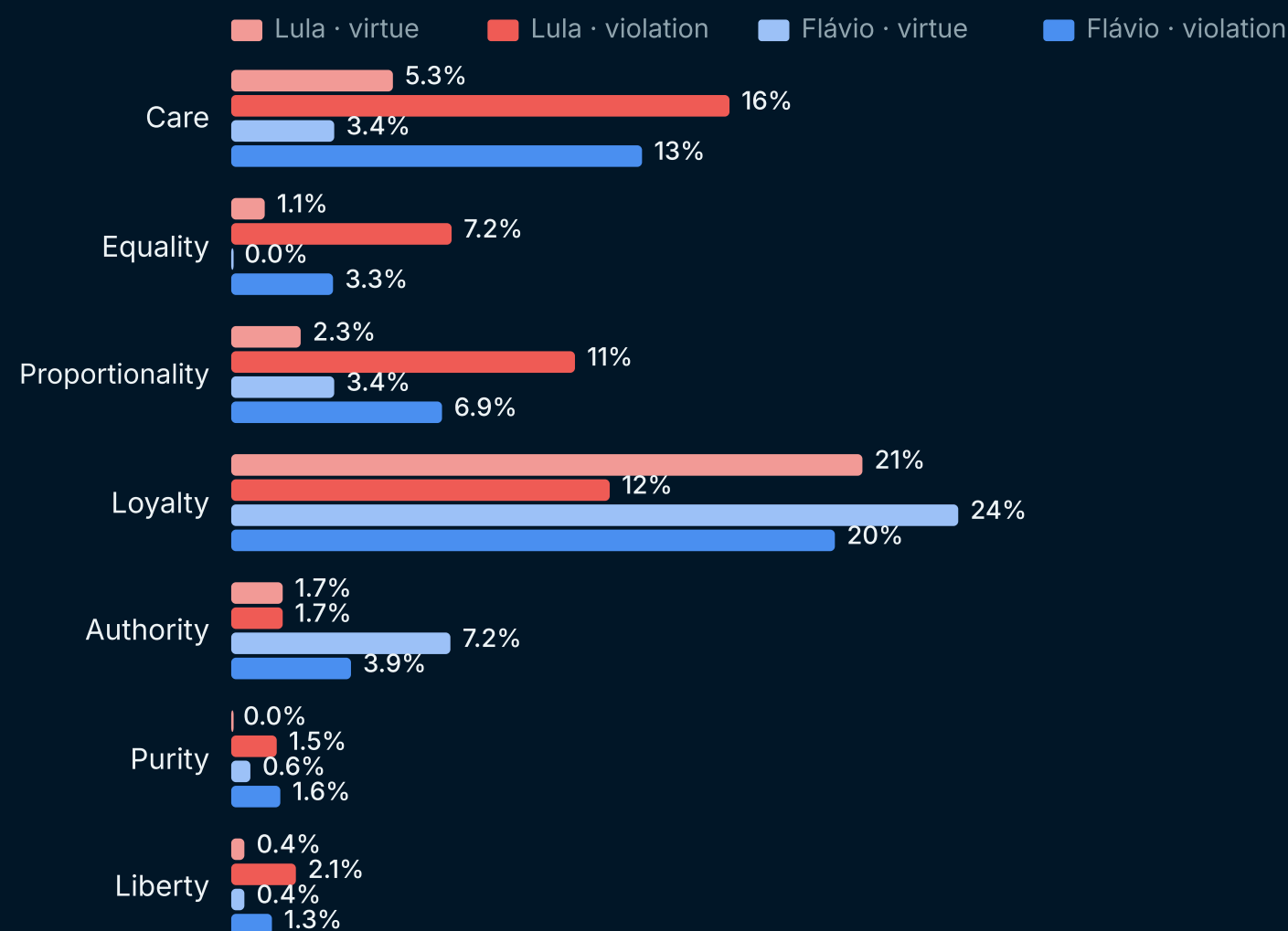
The debate pushed both camps into the same register of hostility, but the loss of hope was greater in Lula's camp, which depended on it more.

MORAL FOUNDATIONS what each camp activates

In the debate, Lula's camp spoke of harm and disproportion, and Flávio's, of authority and betrayal

Moral foundations activated in the debate

% of interactions, by pole (virtue or violation), in the debate window



SEVEN FOUNDATIONS, TWO POLES

The share of interactions on posts that activate each moral foundation, as virtue (positive pole) or as violation (negative pole), by camp, in the debate window.

WHAT EACH CAMP ACTIVATED

Lula's camp activated mainly harm (Care violated) and the disproportion between what one does and what one receives, linked to corruption, which rose +9 points (95% CI: +5 to +13) over the baseline. Loyalty as virtue fell -30 points (95% CI: -43 to -14). Flávio's camp activated Authority as virtue more, which rose +5 points (95% CI: +0 to +11), at the edge of distinguishability, and Loyalty as virtue less, which fell -11 points (95% CI: -22 to -0).

WHEN THE DIFFERENCE IS DISTINGUISHABLE

The celebration of belonging, typical of Lula's base in the previous week, gave way to denunciation, and the morality of Flávio's camp moved closer to order and authority, consistent with the theme of public security.

Lula's camp invoked accountability and transparency, and Flávio's, conservation and the impersonal rule of law

Value orientations and republican values

% of interactions, in the debate window



SCHWARTZ AND REPUBLICAN VALUES

The share of interactions on posts with each Schwartz value orientation and each republican value, by camp, in the debate window.

ACCOUNTABILITY AND TRANSPARENCY

In Lula's camp, accountability rose +30 points (95% CI: +19 to +42) and transparency, +24 points (95% CI: +15 to +34), an effect of the secrecy challenge. Lula's camp maintained self-transcendence, and Flávio's, conservation.

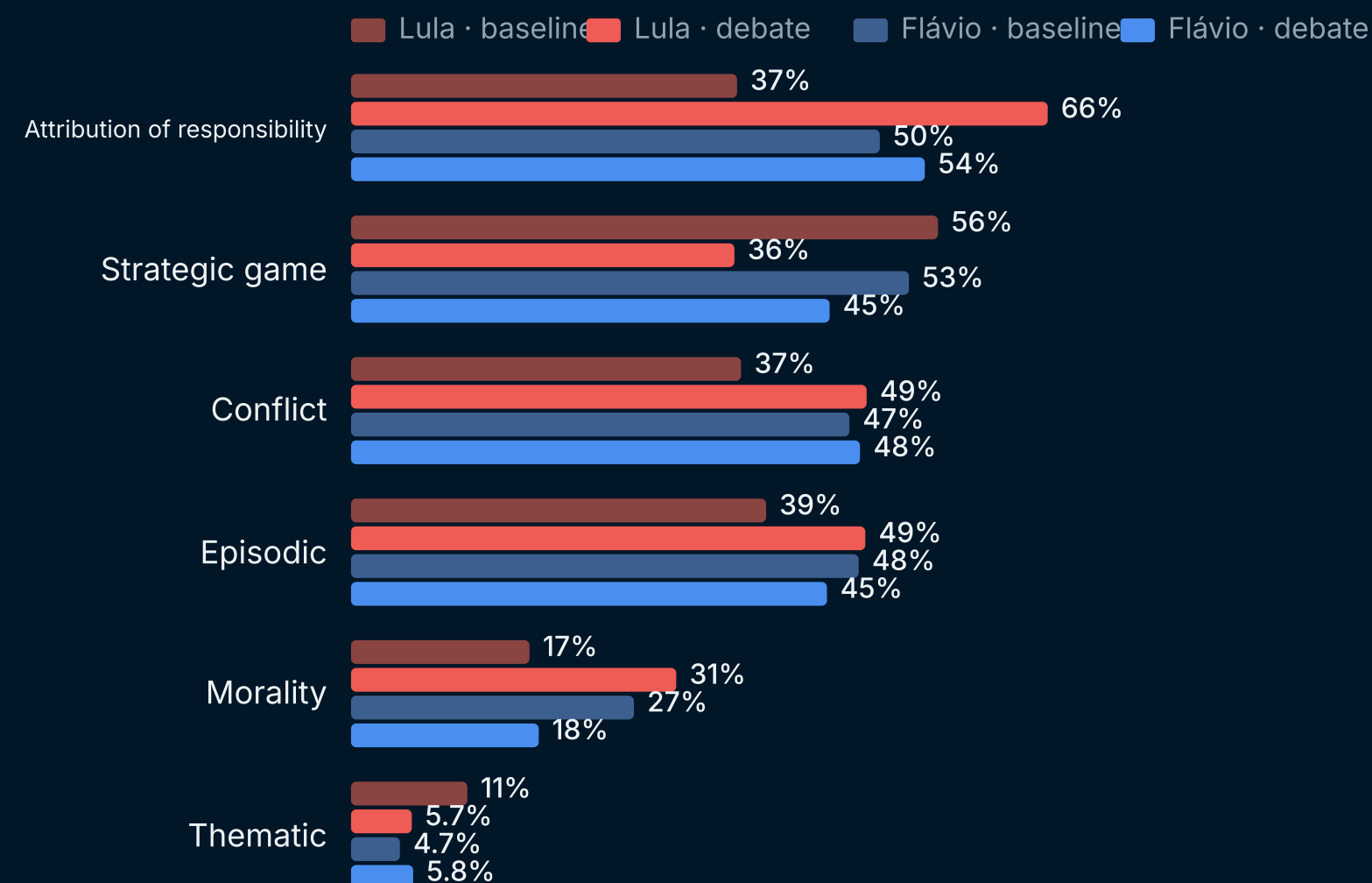
A LANGUAGE THAT CAN REACH BEYOND THE BASE

The demand for transparency gives Lula's camp a republican, and not merely partisan, frame for its denunciation, which may speak to voters outside the base.

The debate replaced the strategic game with the attribution of responsibility, especially in Lula's camp

Generic frames

% of interactions on posts with each frame



RESPONSIBILITY, CONFLICT, GAME AND MORALITY

The share of interactions on posts with each generic frame, by camp and by window. A post may carry more than one.

FROM GAME TO RESPONSIBILITY

In Lula's camp, attribution of responsibility rose +29 points (95% CI: +16 to +42) and the strategic game fell -19 points (95% CI: -32 to -6). In Flávio's camp, changes were smaller and conflict remained high.

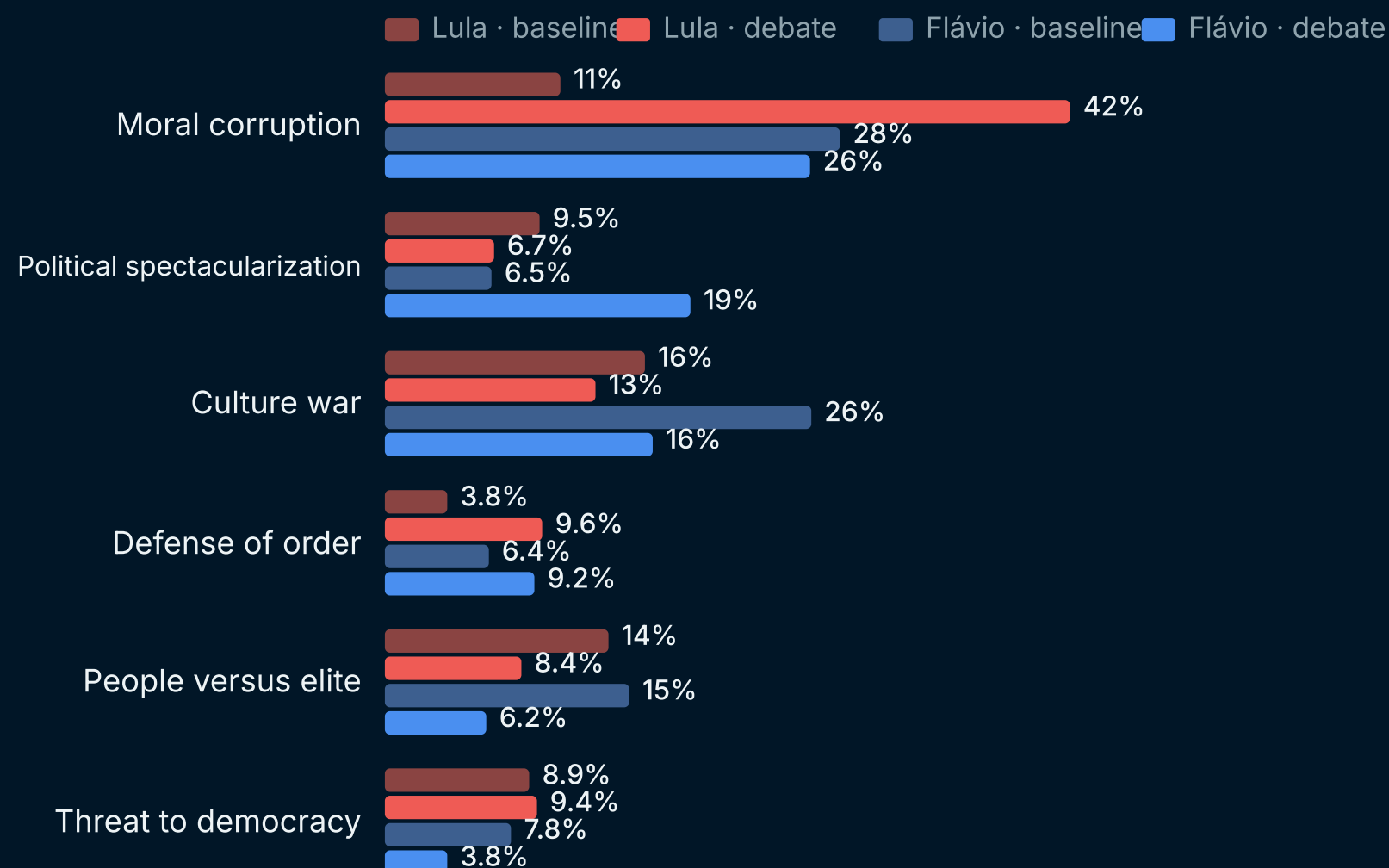
THE DIRECTION OF THE CHANGE

The game frame, centered on polls and tactics, gave way to the assignment of responsibility, which makes the conversation more moral and less strategic.

Moral corruption took over the conversation in Lula's camp, and spectacularization in Flávio's camp

Issue-specific frames

% of interactions on posts with each frame



CORRUPTION, ORDER, CULTURE WAR AND SPECTACLE

The share of interactions on posts with each issue-specific frame, by camp and by window.

MORAL CORRUPTION AND SPECTACULARIZATION

In Lula's camp, moral corruption rose +31 points (95% CI: +19 to +43). In Flávio's, political spectacularization rose +12 points (95% CI: +6 to +19), and the culture war receded -10 points (95% CI: -19 to +2), with no distinguishable difference.

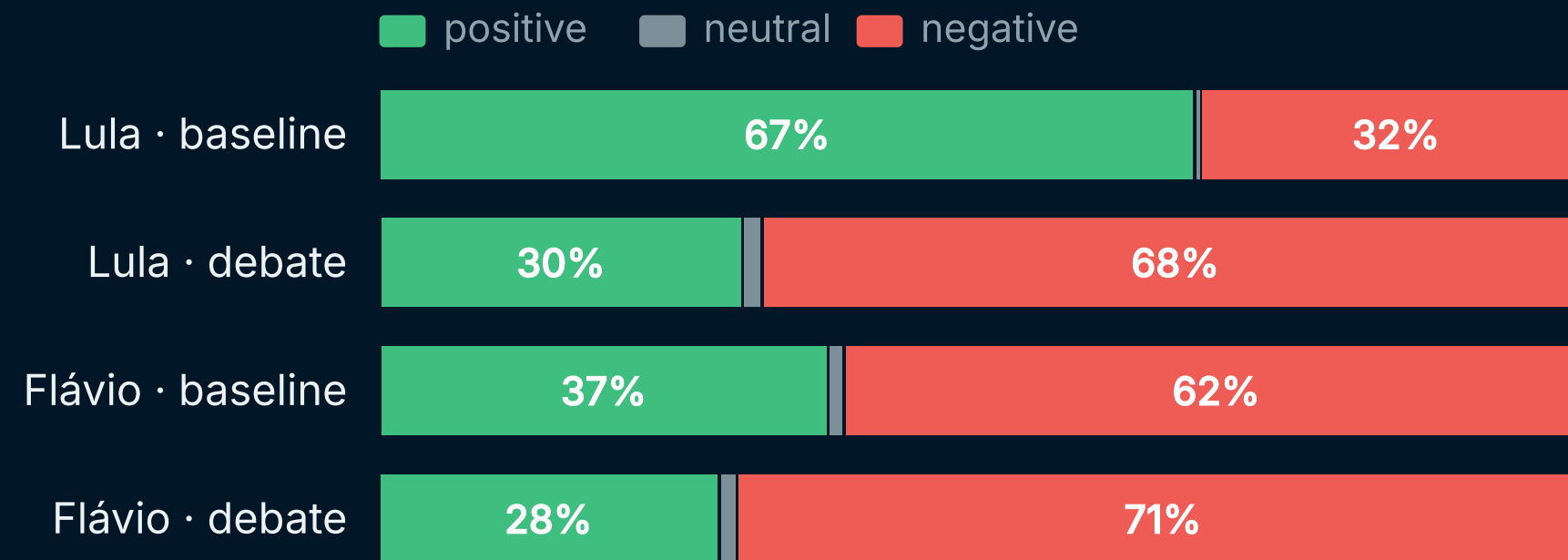
THE REPERTOIRE THE DEBATE REACTIVATED

Both camps spoke of corruption, but with opposite targets, which reproduces the first segment of the debate, and Flávio's camp shifted the cultural dispute toward the performance of the confrontation.

Both camps became more negative, Lula's more sharply

Valence of posts

% of interactions; each row sums to 100%



POSITIVE, NEGATIVE OR NEUTRAL

The share of interactions on posts with positive, neutral or negative valence, by camp and by window.

MORE NEGATIVITY IN BOTH CAMPS

In Lula's camp, negative valence rose +36 points (95% CI: +23 to +48), and in Flávio's, +9 points (95% CI: -3 to +19). Moderate polarization came to predominate in both camps.

ATTACK, NOT PROPOSAL

The negativity accompanies the shift in emotions and frames, and indicates that the reception of the debate was, above all, a moment of attack rather than of proposal.

Each camp assigned the opponent the role of aggressor and the people the role of victim

Narrative roles assigned

% of interactions on posts that assign the role, in the debate window



AGGRESSOR, VICTIM AND PROTECTOR

The share of interactions on posts that assign an entity the role of aggressor, victim or protector, by camp, in the debate window.

MIRRORED PLOTS

In Lula's camp, Flávio Bolsonaro and his family appear as aggressors and the people and workers as victims, with Lula as protector. In Flávio's camp, Lula is the aggressor, and the government and the population of Rio de Janeiro appear in the context of public security.

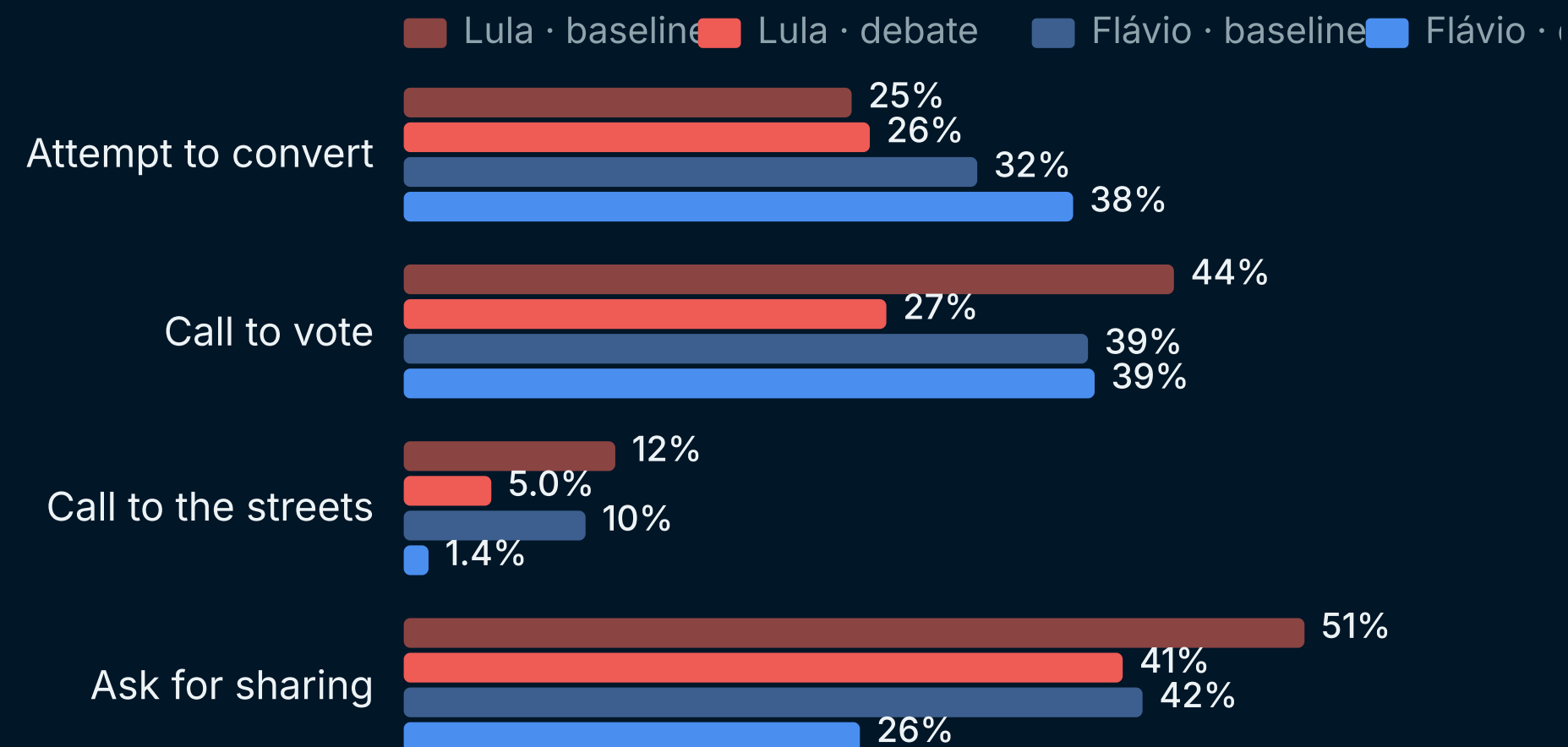
WHY THIS LIMITS PERSUASION

The narrative structure is symmetrical, which is typical of polarized reception, and each camp reinforces the plot it already had, which limits the persuasive effect beyond the bases.

In Lula's camp, calls to vote and to take to the streets receded, and attempts at conversion rose

Mobilization requested in posts

% of interactions on posts with each request



CONVERT, CALL TO VOTE, TAKE TO THE STREETS, SHARE

The share of interactions on posts that attempt to convert, call to vote, call people to the streets or ask for sharing, by camp and by window.

FEWER CALLS TO VOTE

In Lula's camp, calls to vote fell -16 points (95% CI: -32 to -2), the streets almost disappeared and attempts at conversion rose. In Flávio's camp, calls to vote did not change (+0 points (95% CI: -12 to +13)).

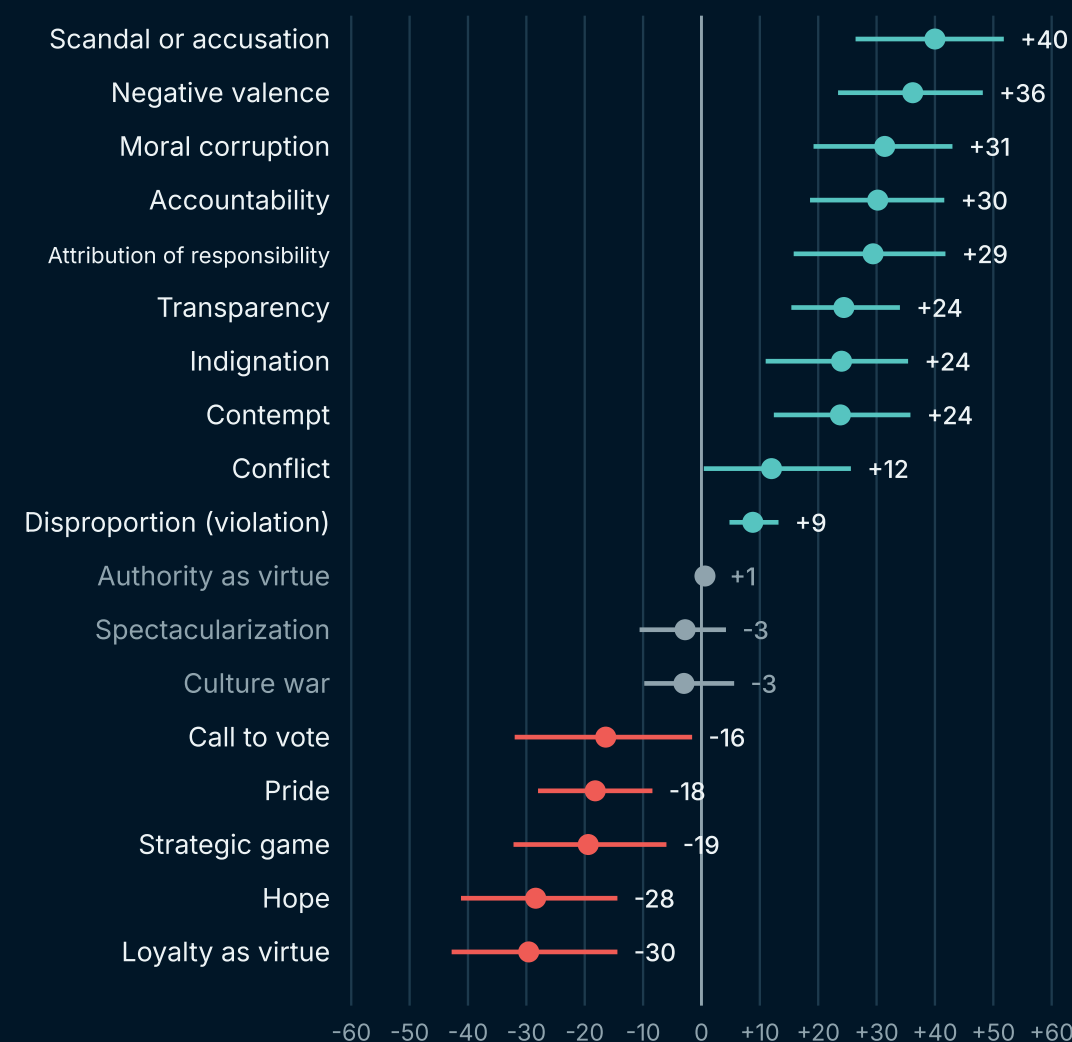
THE LINK TO THE VOTE

The drop in calls to vote is the link between the emotional reception and the simulated effect on the vote. Since it partly recovered the following day, the simulation uses it to calibrate the demobilization of the base, as shown in the section on the digestion of the debate.

In Lula's camp, the clearest changes were the shift from hope to indignation and the demand for accountability

Change from the baseline to the debate window, Lula's camp

percentage points of the share of interactions, with 95% interval



DIFFERENCES WITH 95% INTERVAL

Difference between the debate window and the baseline, in percentage points of the share of interactions, with 95% bootstrap interval, in Lula's camp. In gray, differences whose interval includes zero.

THE LARGEST CHANGES IN LULA'S CAMP

The largest shifts were scandal, negative valence, accountability and moral corruption, upward, and hope, Loyalty as virtue and calls to vote, downward.

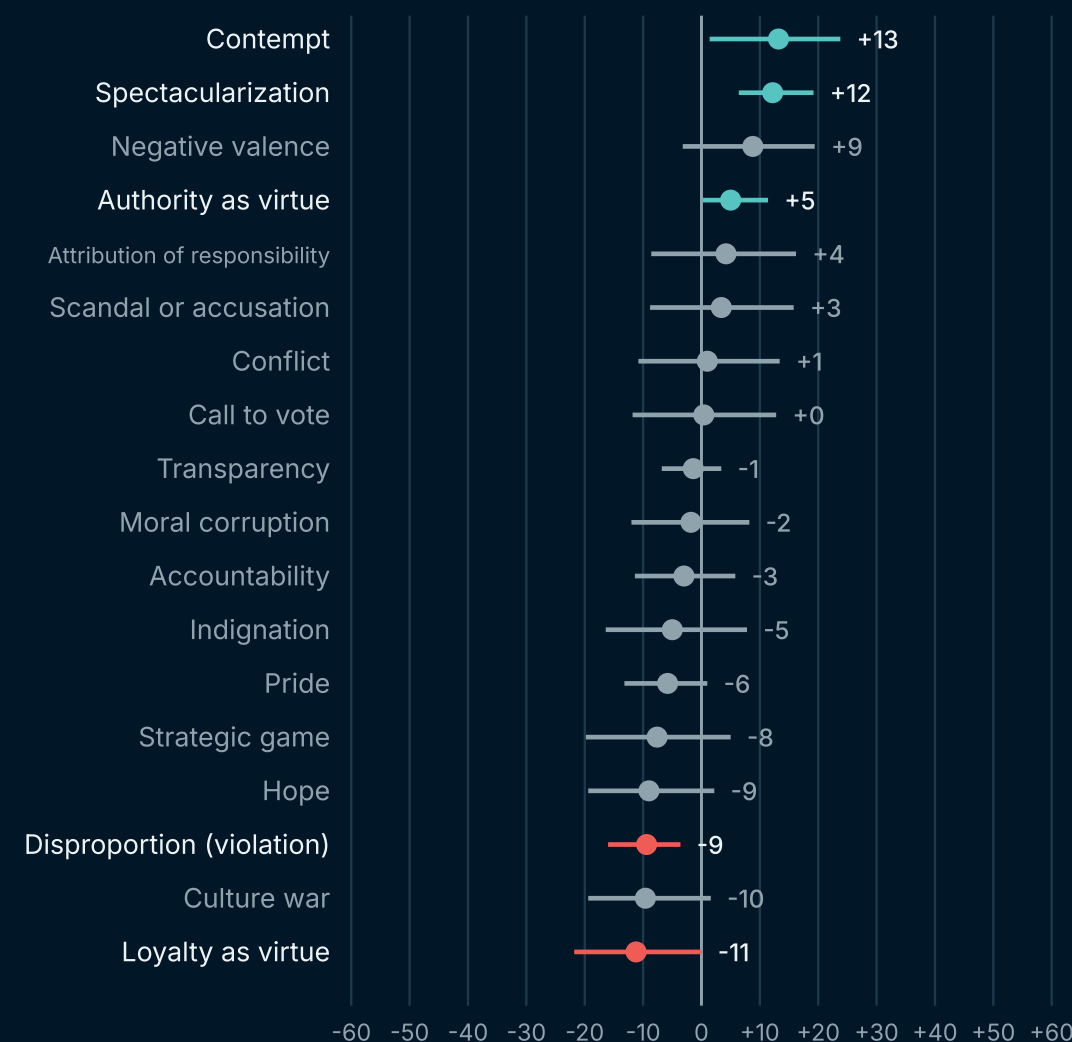
A PATTERN REPEATED ACROSS INSTRUMENTS

The pattern is consistent across all instruments, which reduces the chance that it is an artifact of a single construct or of a few posts.

— SYNTHESIS what changed in Flávio's camp

In Flávio's camp, the debate brought more contempt and spectacularization and less Loyalty as virtue

Change from the baseline to the debate window, Flávio's camp
percentage points of the share of interactions, with 95% interval



THE SAME MEASURES, IN THE OTHER CAMP

Difference between the debate window and the baseline, in percentage points of the share of interactions, with 95% bootstrap interval, in Flávio's camp.

SMALLER AND MORE DISPERSED CHANGES

The shifts were smaller than in Lula's camp, with a rise in contempt and spectacularization and a fall in Loyalty as virtue and in disproportion as violation. Hope and the culture war receded with no distinguishable difference.

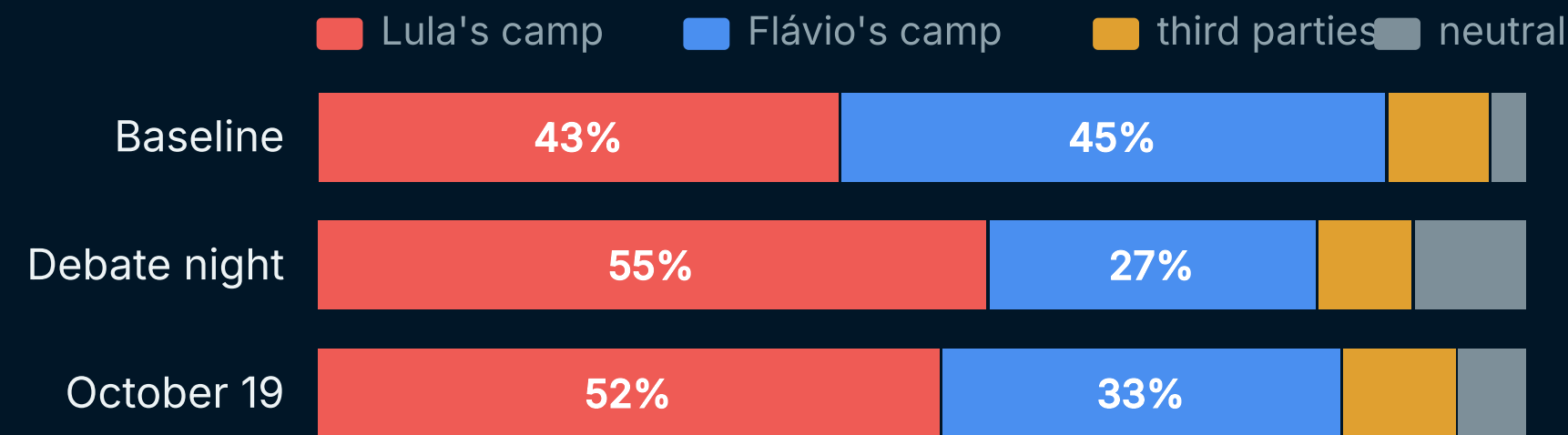
A CHANGE OF TOPIC, NOT OF TONE

Flávio's camp changed topic more than register, and maintained a pattern that was already combative before the debate.

The following day, Flávio's camp regained part of its share, and the debate lost weight in the conversation

Share of interactions about the election, by camp and by moment

% of interactions; each row sums to 100%



THREE MOMENTS COMPARED

The share of interactions about the election that fell to each camp in the baseline, on the night of the debate (October 18, from 7 pm to midnight) and on the following day (October 19), and the share that dealt with the debate itself.

FROM LULA'S DOMINANCE TO FLÁVIO'S REACTION

Lula's camp gathered 55% of interactions on the night of the debate and 51% the following day, against 43% in the baseline, and Flávio's went from 27% to 33%. The debate, the subject of 38% of the night's interactions, fell to 25% on Oct 19.

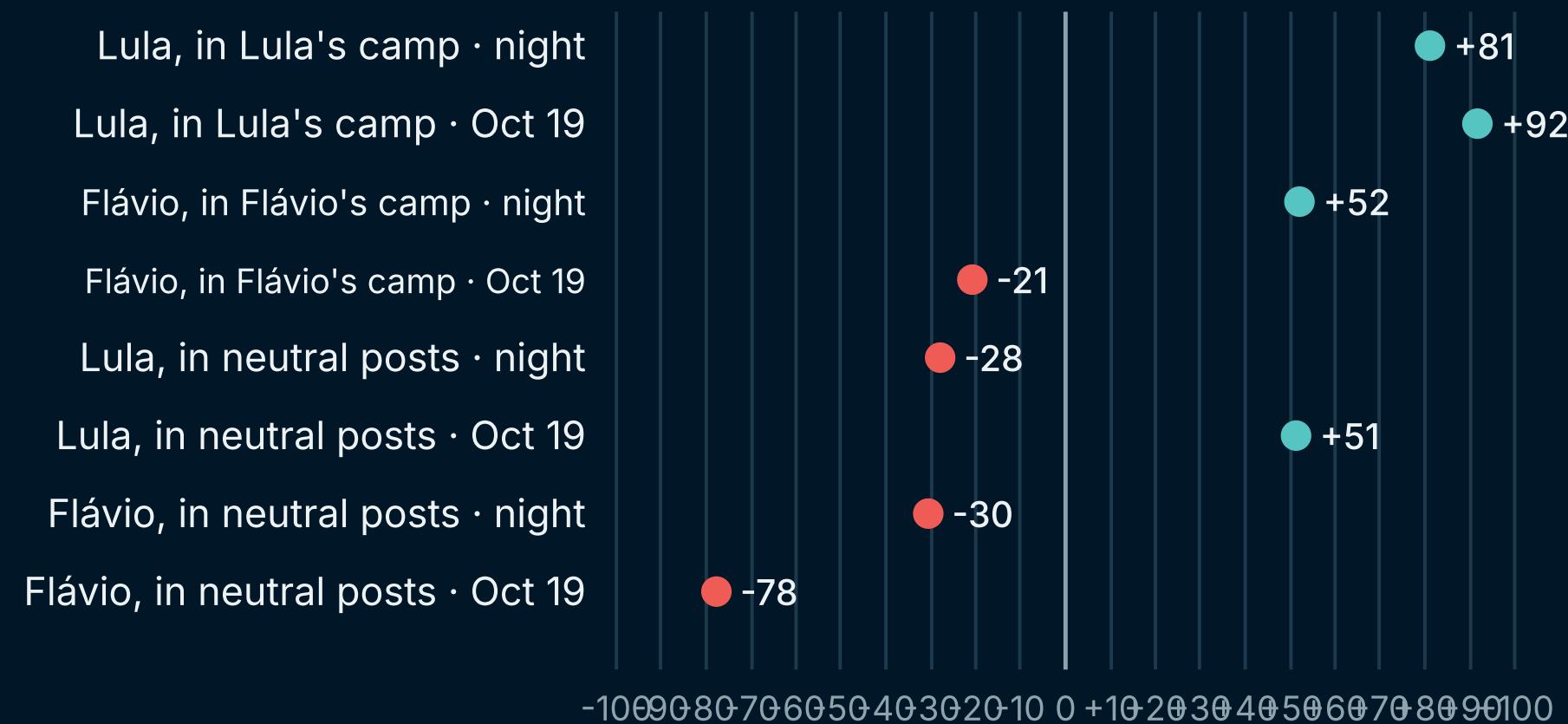
THE DEBATE STILL BEING DIGESTED

Lula's reach advantage survived the night of the debate, but shrank the following day. Posts from October 20 cannot yet be read, because their metrics are still being updated.

The following day, the rating of Flávio's performance worsened, including within his own camp

Net rating of debate performance

positive minus negative ratings, in points, among posts that rate the candidate



THE NET RATING, MOMENT BY MOMENT

The net balance between positive and negative ratings of each candidate's debate performance, in points, among posts that rate him, weighted by interactions, on the night of the debate and on October 19.

FROM THE STAGE TO THE NEXT DAY

In Lula's camp, Lula's net rating went from +81 to +92. In Flávio's camp, Flávio's own net rating fell from +52 on the night to -21 the following day. Among neutral posts, mainly from the press, Lula went from -28 to +51, and Flávio, from -30 to -78.

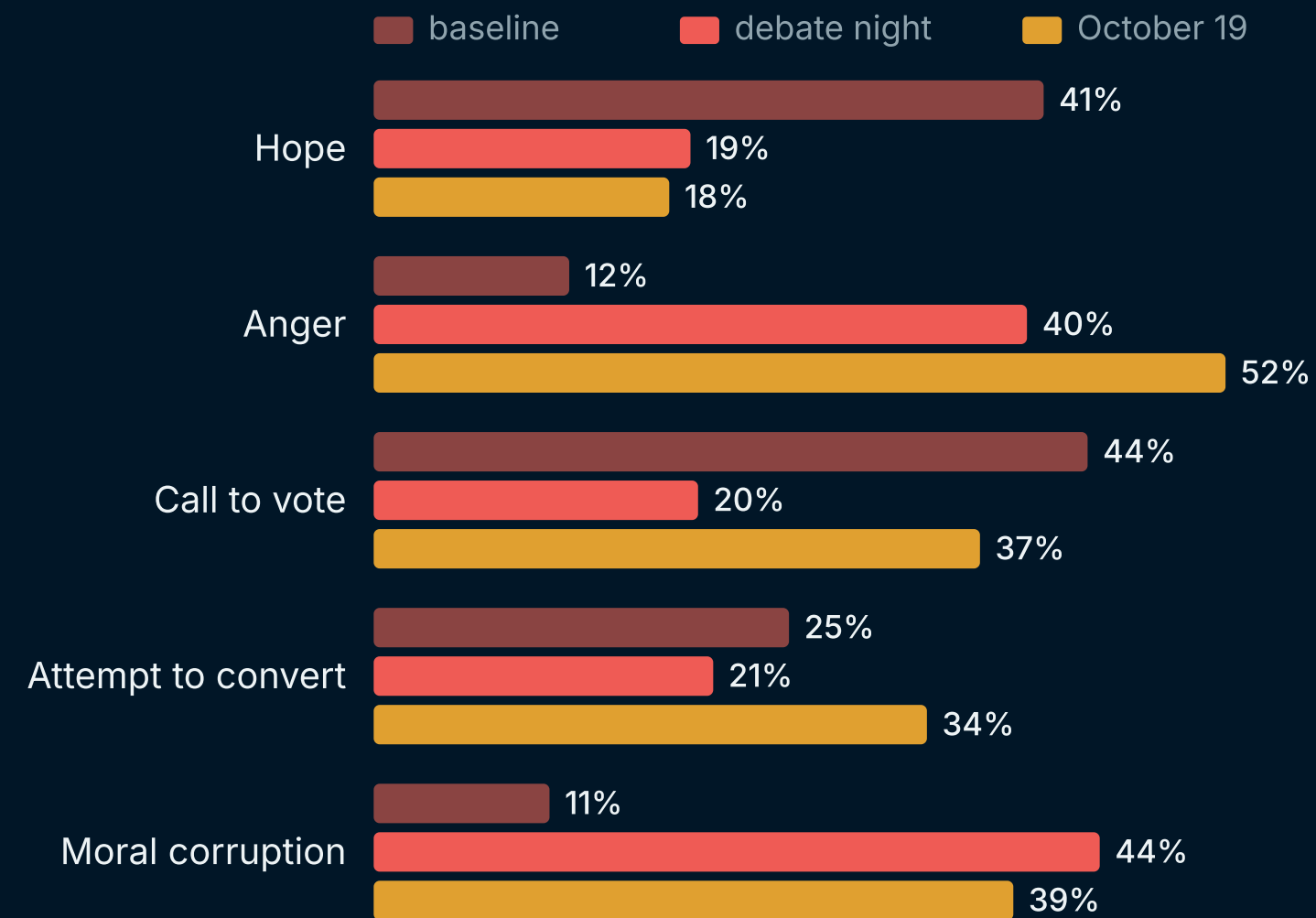
AN ADVANTAGE LARGER THAN IN THE GROUPS

The interpretation formed afterward favored Lula, as the literature on debates predicts (FRIDKIN et al., 2007). Since the next-day ratings come from few posts, the simulation uses the net rating for the whole window, 0.60, as the ceiling of the rating advantage, and that of the undecided in the qualitative groups, 0.18, as the floor.

In Lula's camp, hope did not return the following day, but calls to vote partly recovered

Lula's camp before, during and after the debate

% of interactions in Lula's camp on posts with each trait



EMOTION AND CALLS TO VOTE AT THREE MOMENTS

The share of interactions in Lula's camp on posts with each trait. Emotion and mobilization come from the reading of the camp, and moral corruption from the Orikom® classification.

ANGER UP, CALLS TO VOTE BACK

Hope stood at 19% on the night and 18% the following day, against 41% before the debate, and anger rose from 40% to 52%. Calls to vote, which had fallen from 44% to 20% on the night, returned to 37% on Oct 19, and attempts at conversion rose from 21% to 34%. In Flávio's camp, hope stayed close to 9%.

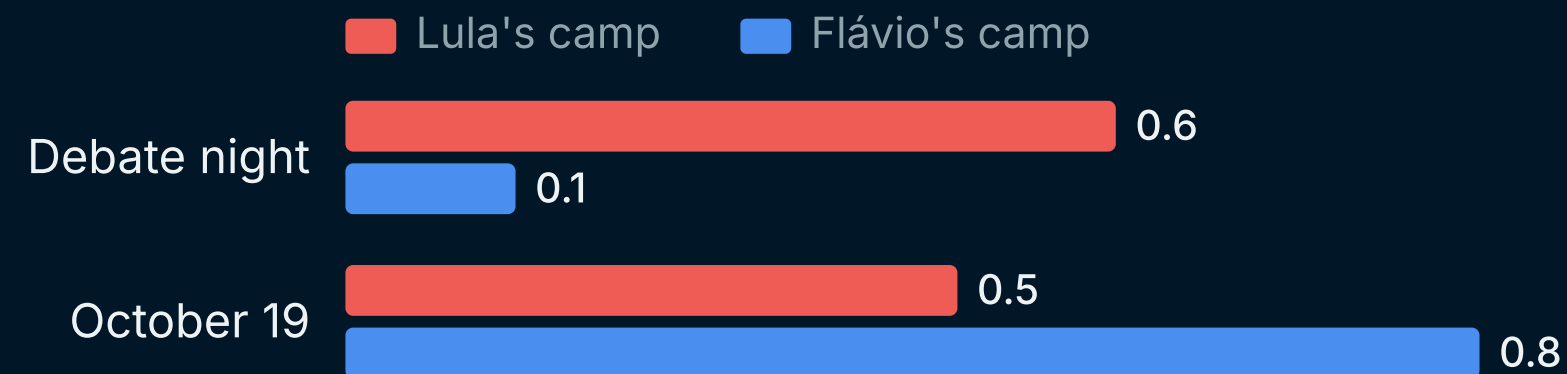
WHAT RECALIBRATES DEMOBILIZATION

Hope did not return, but mobilization largely recovered within 24 hours. The demobilization applied from October 19 onward therefore ranges from the hope ratio (0.46 of the baseline) to the ratio of calls to vote on the following day (0.85).

Debate clips shifted from Lula's camp to Flávio's the following day

Interactions on debate clips, by camp

millions of interactions on posts that carry excerpts from the debate



THE DEBATE THAT CIRCULATED IN EXCERPTS

Interactions on posts about the debate that carry an excerpt of it, such as clips, moments and answers that went viral, by camp, on the night of the debate and on October 19, identified by terms in the text.

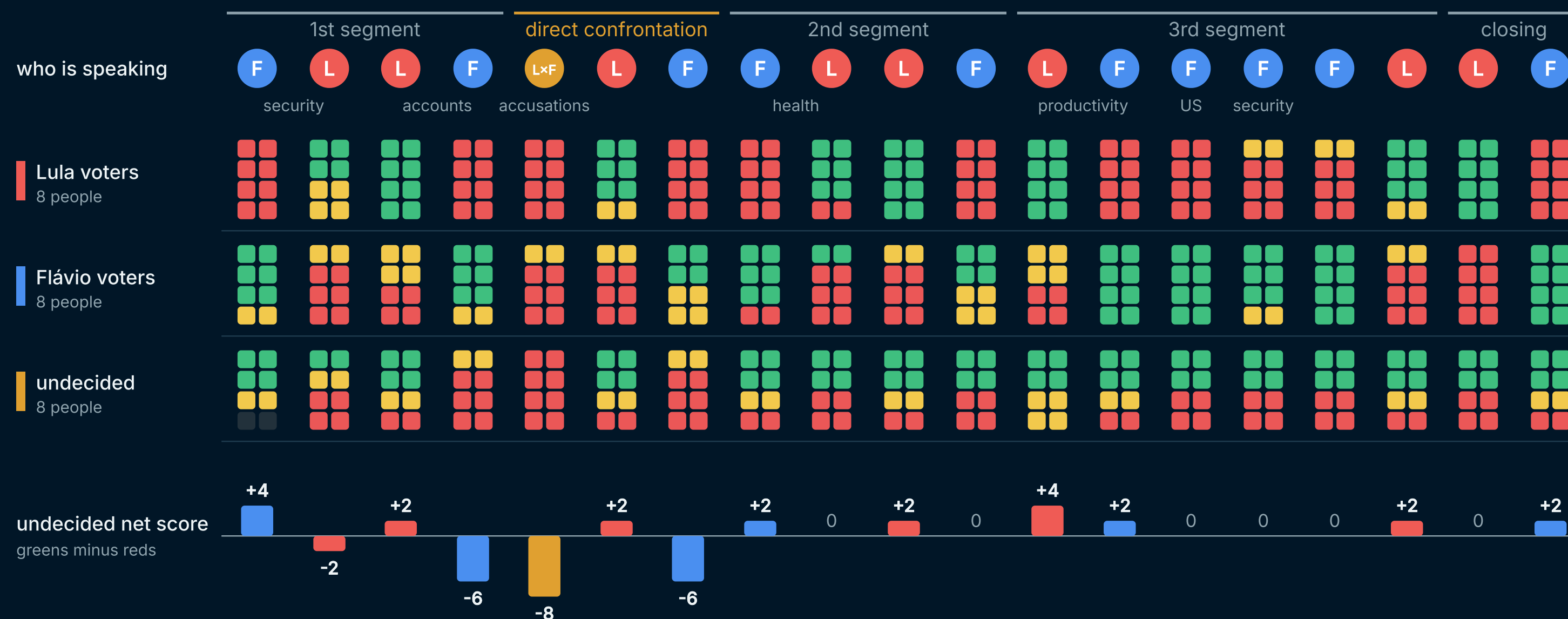
THE TURN IN CLIPS ON OCT 19

On the night, Lula's camp's clips gathered 0.6 million interactions, against 0.1 million for Flávio's camp; the following day, it was 0.5 million against 0.8 million. The Oct 19 clips were framed mainly as spectacularization (32%) and defense of order (22%).

WHO TELLS THE DEBATE TO THOSE WHO DID NOT WATCH IT

Clips are a small part of the conversation, 3% to 5% of interactions, but they show the dispute over interpretation, and Flávio's camp responded the following day with excerpts framed as defense of order.

The undecided approved more of Lula's statements, and no one approved of the confrontation



■ approved
 ■ neutral
 ■ disapproved

Combined net score of the undecided: **Lula +10** · **Flávio -2** · **confrontation -8**

Lula seemed better and more truthful, but the vote barely moved

VOTE AT THE END OF THE DEBATE



10 Lula 6 Flávio 8 null vote, all without conviction

One undecided participant switched from Flávio to Lula, and one Flávio voter ended up in doubt. The unconvinced null voters are the voters the confrontation pushed away.

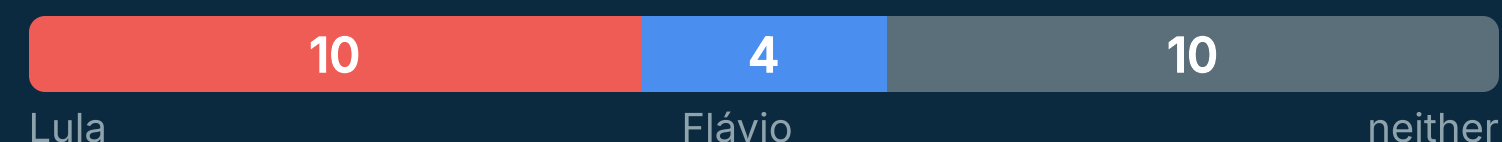
HOW THE GROUP DESCRIBED THE DEBATE

Sadness Mediocrity Repetition Embarrassment Unpleasant surprise
Mockery Lack of substance Dismay Disappointment Irresponsibility

Who did better in the 1st segment



Who came across as more truthful



Who was more aggressive





Debates are high-visibility events whose effect on the vote tends to be small and indirect

The Band debate between Luiz Inácio Lula da Silva and Flávio Bolsonaro, on October 18, 2026, one week before the runoff, was the first direct confrontation between the two candidates and drew an audience of tens of millions of people on television, YouTube and social media. Events of this kind concentrate public attention, but the literature records that they rarely change vote choice on average. In Brazil, the direct audience is small and selective, more educated and already decided, and the effect reaches voters mainly through what is said afterward, in the press, in free electoral airtime, on social media and in conversations (VEIGA; SOUZA; SANTOS, 2007; VASCONCELLOS, 2013).

This study examines the reception of the debate on social media through four questions. First, how the debate redistributed reach among the political camps. Second, how each camp rated the candidates' performance. Third, which emotions, moral foundations, values and frames dominated the conversation, compared with the preceding days. Fourth, what probable effect this reception has on Lula's chance of a comeback, estimated by simulation.

In Brazil and elsewhere, debates move the vote little, and what circulates afterward weighs more than the stage

In 62 elections in ten countries, Le Pennec and Pons (2023) found no measurable effect of televised debates on the vote, and the meta-analysis by Benoit, Hansen and Verser (2003) records modest effects, clearer on issue knowledge than on preference. Fridkin et al. (2007) show that candidate evaluations depend as much on the stage as on the analysis that follows it. In Brazil, between 1989 and 2010, on average 38% of voters watched the debates or heard about them, which did not change the candidates' positions in the polls and indirectly consolidated those of the front-runners (VASCONCELLOS, 2013).

According to the 2010 Brazilian Electoral Study, those who watched debates were less likely to abstain or cast a null vote (BEZERRA; MUNDIM, 2011). On the second screen, conversation deals more with spectacle than with politics, 65.4% of messages during the 2014 Globo debate (ORTIZ et al., 2017), the press produces what the general public spreads (ANGELUCI; SILVA, 2019), and in 2022 about one third of the presidential candidates' videos on TikTok were clips made by third parties from debates, interviews and podcasts (SIECZKO, 2024). Since 2018, no study has measured the effect of debates and their clips on the vote, a gap this study seeks to begin to fill.

In the hybrid media system, communication reaches voters filtered through each camp's own circuits, especially in the Bolsonarist camp

Marcelo Alves calls disarrangement of visibility the loss, by the press, of its role as the central gatekeeper of the information that reaches the public, without the press disappearing, and information disorder its consequence, the formation of conspiratorial epistemic regimes hostile to journalism, the university and civil society (SANTOS JUNIOR, 2019). In 2018, political pages already outperformed news outlets in shares (SANTOS JUNIOR; ALBUQUERQUE, 2019), and networks of pages without declared authorship amplified far-right leaders (SANTOS JÚNIOR, 2023).

In Bolsonarist WhatsApp groups, traditional media account for less than 5% of sources, and influencers and YouTube channels occupy the center (SANTOS; CHAGAS; MARINHO, 2022). The app functions as a domain of truth in the face of a public sphere seen as a place of manipulation (CESARINO, 2020), and using it as a source was associated with nearly double the odds of voting for Bolsonaro in 2018 (MUNDIM; VASCONCELLOS; OKADO, 2023). Polarization, however, is mainly affective and concentrated among the most engaged (ORTELLADO; RIBEIRO; ZEINE, 2022; FUKS; MARQUES, 2022), which leaves part of the electorate within reach of both sides.



Campaigns activate predispositions and inform more than they convert, and information reaches least those who abstain most

In an experiment during the 2022 election, campaign videos moved only third-way and undecided voters, with no effect on those who intended to cast a null vote or not turn out (PEREIRA; NUNES, 2024). In 2018, free electoral airtime increased knowledge about the candidates more than it changed preferences (BORBA; DUTT-ROSS, 2021), and Bolsonaro's victory rested on the campaign's activation of anti-PT sentiment and right-wing identity (AMARAL, 2020).

Policy information changes preferences when it reaches voters (TURGEON; RENNÓ, 2010), but campaigns do not reduce the informational disadvantage of less privileged groups (RENNÓ, 2007), precisely those who abstain most, such as the less educated (CERVI; BORBA, 2022). This helps explain why measures of broad social reach, such as the income tax exemption, reach part of the electorate little, or reach it reinterpreted, and why mobilizing turnout weighs so heavily in the final stretch.

Emotions, moral foundations, values and frames describe the reception in complementary layers

Emotions are read in the tradition of affective intelligence (MARCUS; NEUMAN; MACKUEN, 2000), in which enthusiasm mobilizes and reinforces loyalty, while anxiety and anger alter attention and judgment. Moral foundations follow the theory of Graham, Haidt and Nosek (2009), in the seven-foundation version in which fairness splits into equality and proportionality (ATARI et al., 2023). Values follow Schwartz's four higher-order orientations (1992; 2012) and a list of republican values, such as accountability and transparency.

Frames combine the generic frames of Semetko and Valkenburg (2000), such as attribution of responsibility, conflict and morality, with the distinction between episodic and thematic (IYENGAR, 1991) and the strategic game frame (CAPPELLA; JAMIESON, 1997), as well as issue-specific frames of the Brazilian debate, such as moral corruption and culture war. Framing is understood as the selection and salience of aspects of reality that promote a problem definition, a causal interpretation and a moral evaluation (ENTMAN, 1993).

Each camp's communication circulates mainly among its own, and Lula's reaches the other side through the opponent's clips

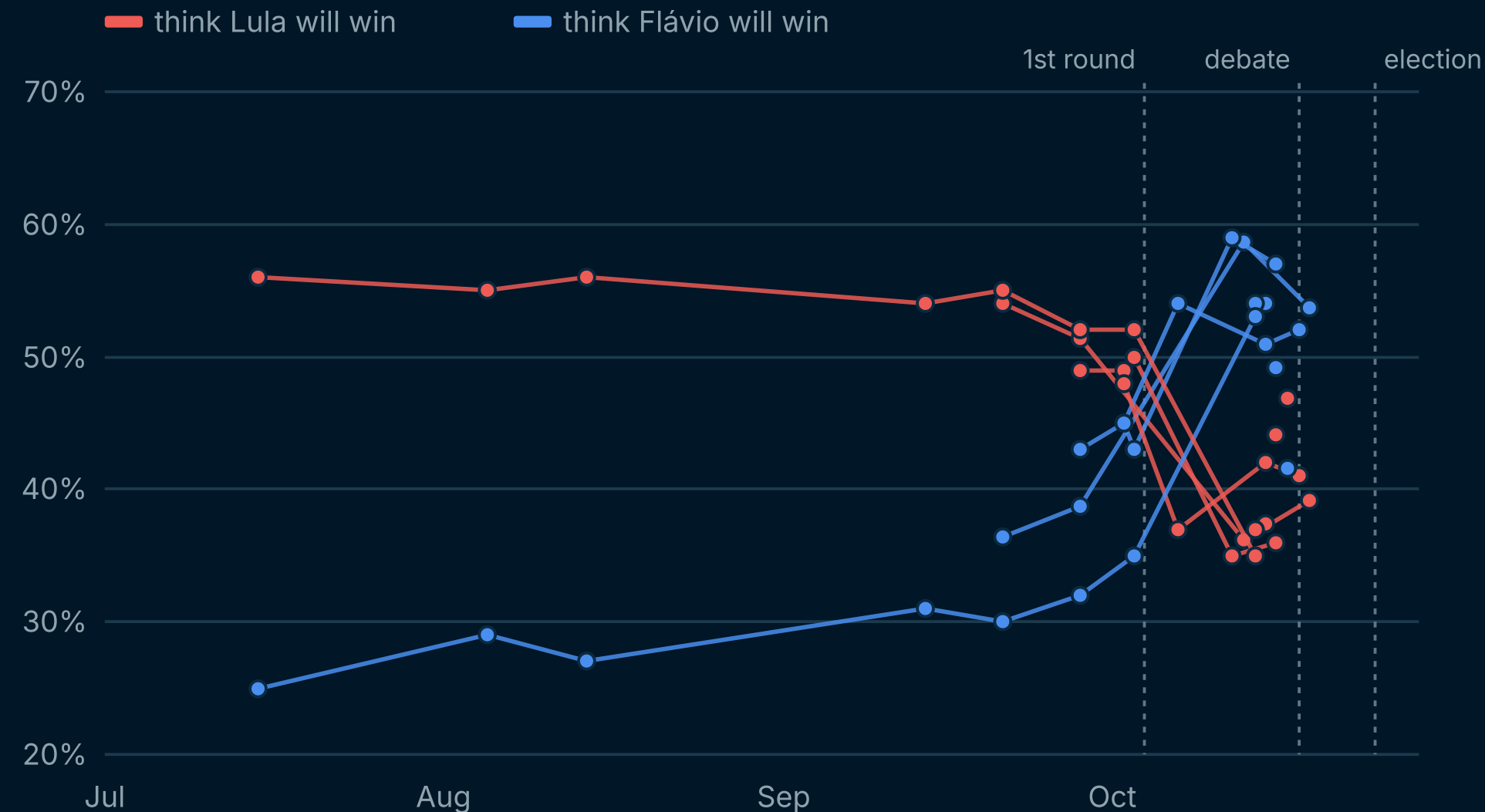
In the debate window, 1% of posts gathered 47% of interactions, and each camp assigned the other the role of aggressor and the people the role of victim, in mirrored plots. The debate was the subject of 38% of interactions on the night it took place and of 25% the following day, and the clips, which carry the debate to those who did not watch it, came to belong mainly to Flávio's camp, framed as spectacle and defense of order.

This is the pattern the Brazilian literature describes for the hybrid media system, in which the press loses centrality and each camp's circuits filter and reinterpret what arrives from the other side (SANTOS JUNIOR, 2019; SANTOS; CHAGAS; MARINHO, 2022). This is why the estimated effect of Lula's communication comes little from converting Flávio's voters and largely from mobilizing his own camp and those who did not turn out in the first round. The real limit of this communication is reaching the less engaged voter without the opponent's mediation.

After the first round, the majority came to bet on Flávio's victory, and the bet receded slightly in the second week

Who will win the election

% who think each candidate will win, by polling firm, July to October



WHO VOTERS THINK WILL WIN

The share who think each candidate will win, regardless of their own vote, in the eight national polls that ask this question.

THE EXPECTATION SWITCHED SIDES

Until October 3, the majority expected Lula to win (Quaest, 52% to 35%). After the first round, 51% to 59% came to name Flávio, and in the second week the bet on him receded in Nexus (from 59% to 54%), Gerp (from 59% to 57%) and PoderData (from 54% to 52%). Only Vox Brasil has Lula ahead.

WHY EXPECTATIONS WEIGH ON THE VOTE

The expectation of victory changed far more than vote intention, which moved two to three points. It weighs on turnout and on those who prefer to vote for whoever is going to win (AGRANOV et al., 2018), and it is a mechanism the simulation does not yet incorporate.

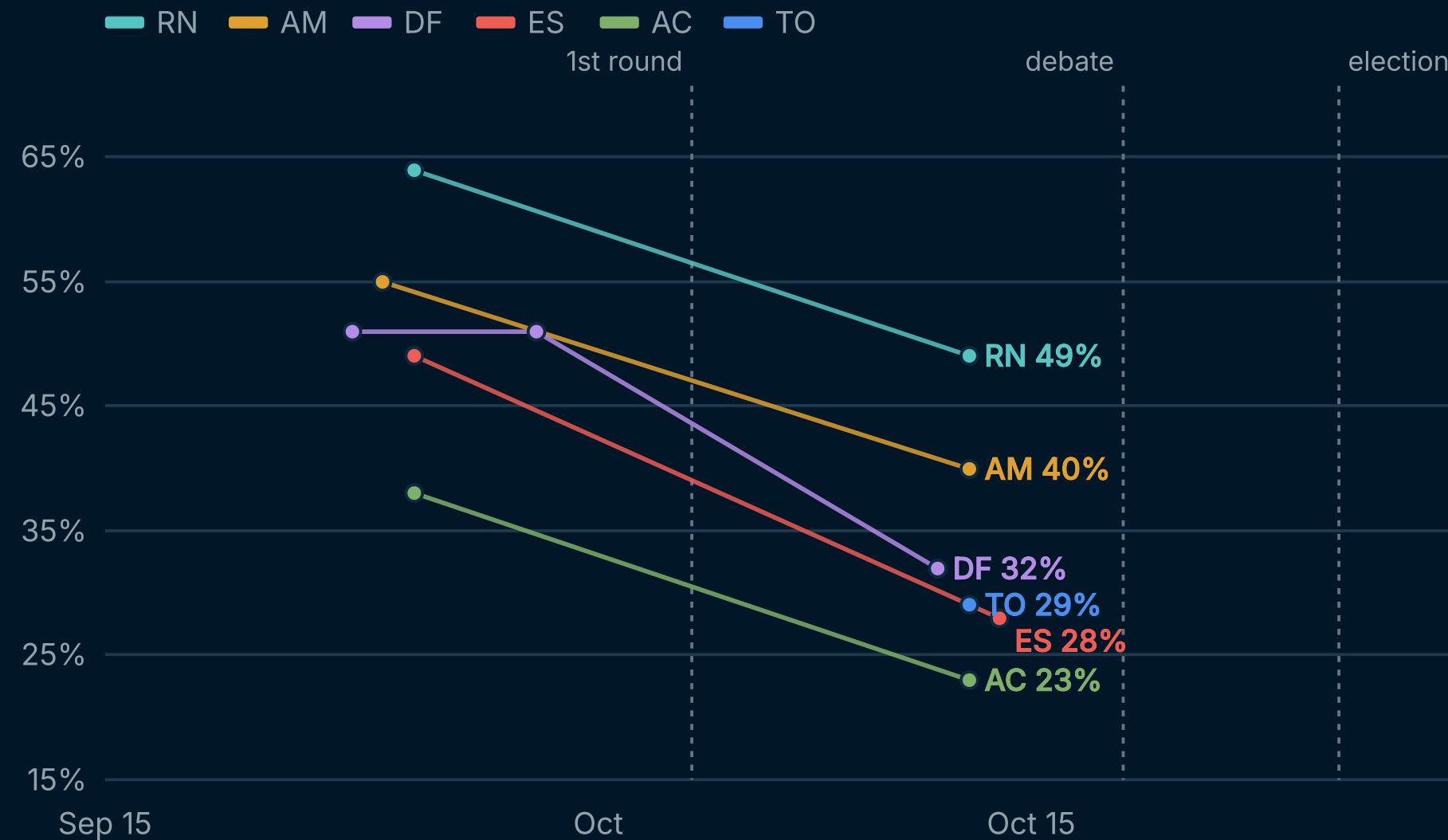
Five new polls maintain the statistical tie, with Lula between 48% and 49.6% of valid votes

POLLING FIRM	FIELDWORK	INTERVIEWS AND MODE	REGISTRATION	LULA, VALID VOTES
DataTrends	Oct 15–17	2,000, telephone	BR-04454/2026	48.5%
Futura Inteligência	Oct 16 and 17	2,000, telephone	BR-06715/2026	49.6%
Alfa Inteligência	Oct 15–19	2,700, face-to-face	BR-00820/2026	48.5%
Real Time Big Data	Oct 15–19	2,000, telephone	BR-02952/2026	48.0%
Instituto França	Oct 16–20	3,000, telephone	BR-07896/2026	49.2%
7-day average	Oct 14–20	17 polls		49.1%

In the states, the bet on Lula fell 15 to 21 points, even where he leads in vote intention

Think Lula will win, by state

% in Quaest state polls, late September and mid-October



THE STATE RUNOFF POLLS

The share who think Lula will win the national election, in Quaest state polls with waves in late September and on Oct 12–14, in Rio Grande do Norte, Amazonas, the Federal District, Espírito Santo, Acre and Tocantins.

STATE BY STATE

The bet on Lula went from 64% to 49% in Rio Grande do Norte, from 55% to 40% in Amazonas, from 51% to 32% in the Federal District, from 49% to 28% in Espírito Santo and from 38% to 23% in Acre; in Tocantins, it was 29% on October 14. In Rio Grande do Norte, Lula leads 59% to 33% in vote intention, and in Amazonas, 47% to 43%.

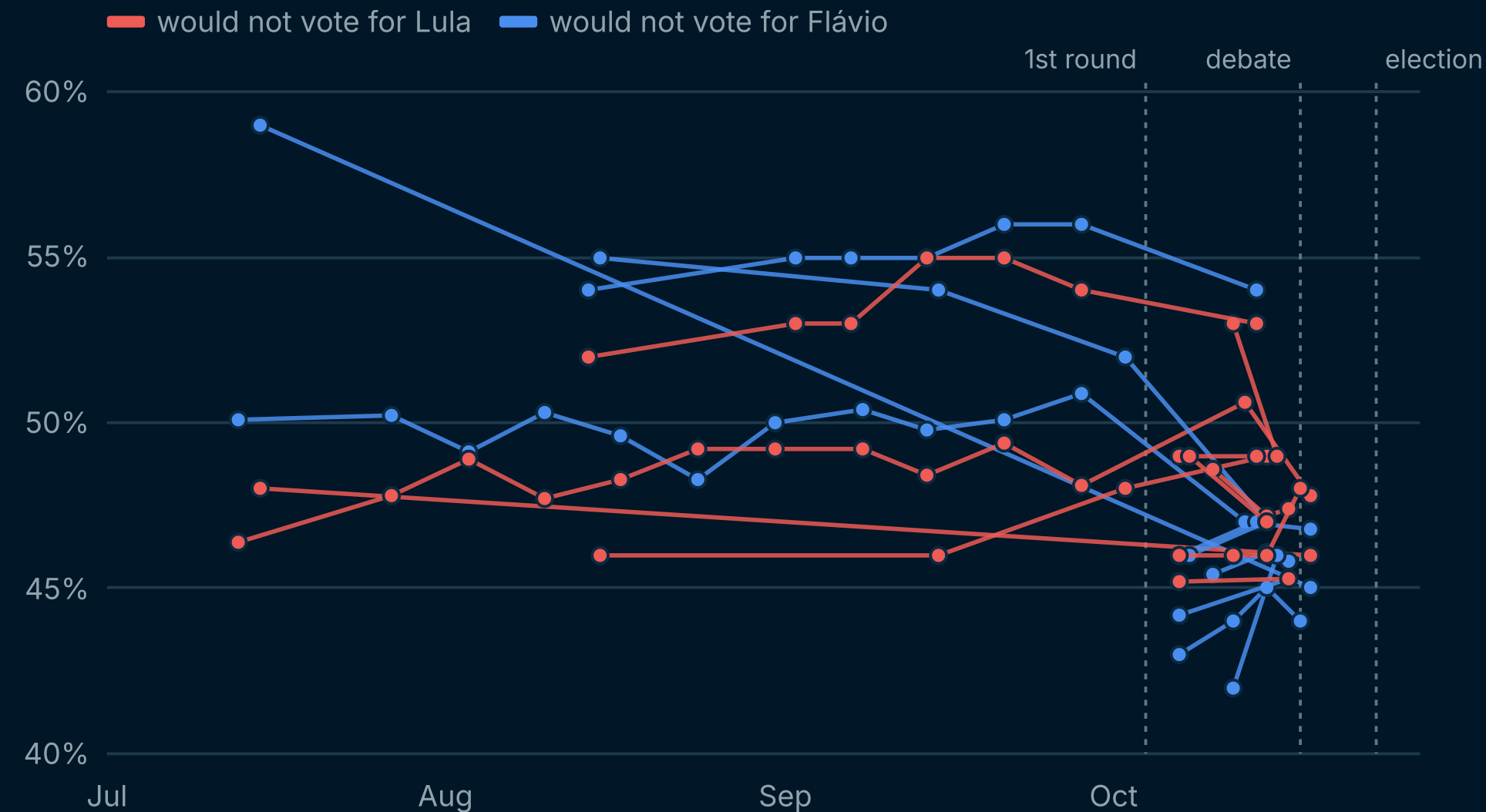
AN EXPECTATION DETACHED FROM THE VOTE

The drop is widespread and does not track local vote intention, which indicates that the expectation responds to the first-round result and its repercussions, not to a change of opinion about the candidates.

Rejection of Flávio fell and tied with that of Lula in most polling firms

Would not vote for under any circumstances

% by candidate and polling firm, July to October



WHOM VOTERS WOULD NOT VOTE FOR UNDER ANY CIRCUMSTANCES

The share who would not vote for each candidate under any circumstances, by polling firm, July to October.

A TIED REJECTION

In CNT/MDA, rejection of Flávio went from 57% in June to 47% in the second week of the runoff campaign; in Alfa, from 59% in July to 45%; in Nexus, from about 50% to 47%. Lula's stayed between 46% and 50% in most series. In Quaest, which asks differently, both are above 50% and tied (53% and 54%).

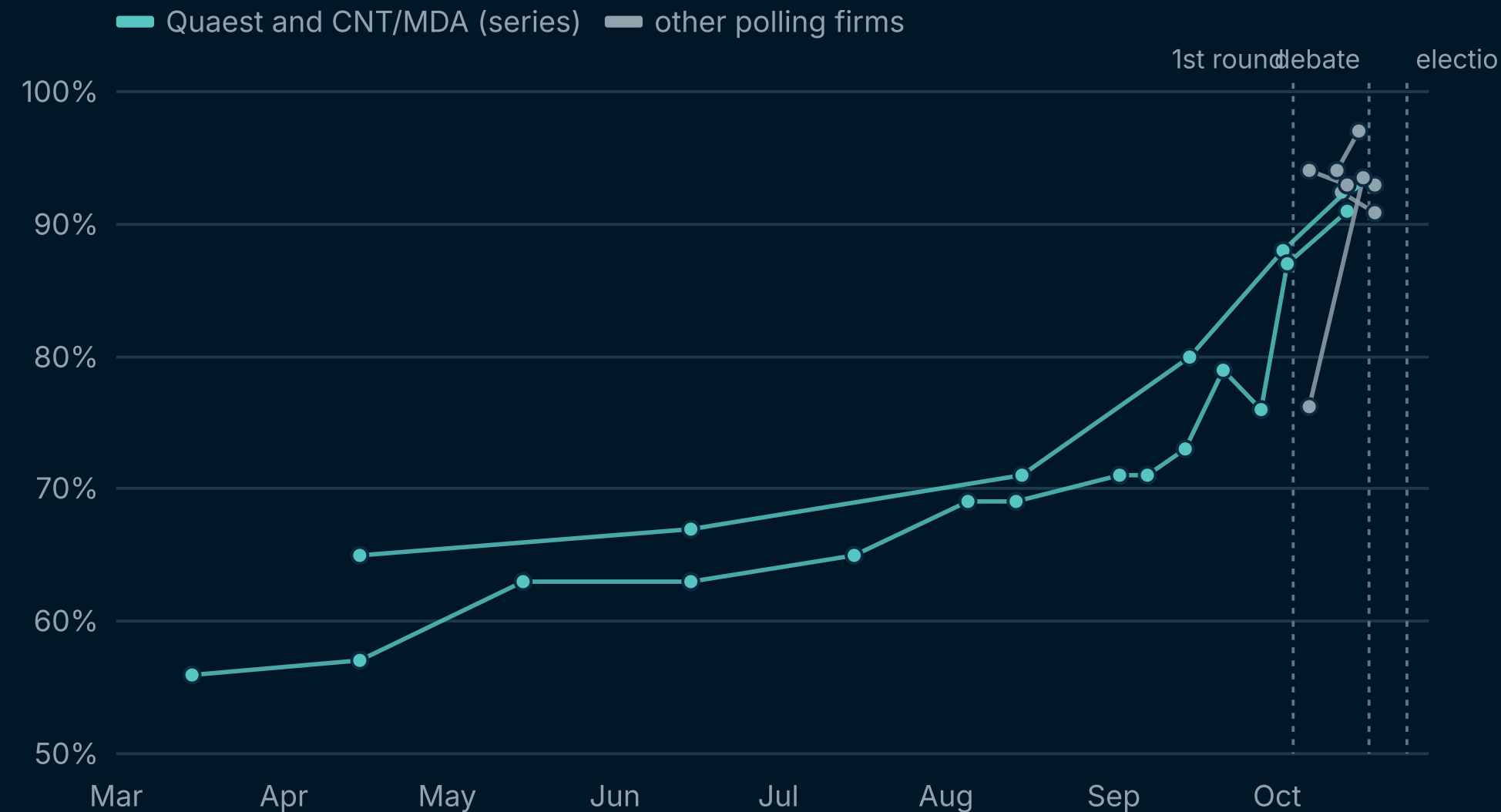
WHO HAS MORE TO LOSE

With rejection tied, neither has a ceiling that prevents him from winning, and the race will be decided among the few who have not yet settled their vote and by turnout.

Over 90% say their vote is decided, and the room for change is 3% to 9% of the electorate

Definitive vote

% who say their choice will no longer change, by polling firm, March to October



HOW MUCH OF THE VOTE IS ALREADY DECIDED

The share who say their vote choice is definitive, in the Quaest and CNT/MDA series and in the waves of the other polling firms.

WHAT CAN STILL CHANGE

In Quaest, the definitive vote went from 56% in March to 91%, and in CNT/MDA, from 65% in April to 93%. Today, 91% to 97% say they are decided. The share that can still change is larger among the poorest (12% up to 1 minimum wage, against 5% above 5, in Nexus) and among those who voted for Cury, Renan, Caiado or Zema in the first round (22% in Datafolha).

THE CEILING FOR THE EFFECT OF COMMUNICATION

The effect the simulation attributes to communication must fit within this limit. A shift that required changing more than 3% to 9% of the electorate would contradict what voters themselves declare.

Abstention, the vote against the government and the limits of persuasion: experts' readings and social media data

WHO	WHAT THEY ARGUE	WHAT THIS STUDY'S DATA SHOW
Antonio Lavareda, Oct 20	Abstention weighs more heavily on Lula's base, which is poorer and older. Since 2002, the PT has lost, on average, 8 points between the eve of the vote and the ballot box in the first round.	Calls to vote in Lula's camp fell from 44% to 20% of interactions on debate night and returned to 37% the following day.
Alberto Carlos Almeida, Oct 20	Those who want a change of government cannot be persuaded to vote for Lula, and that is why the campaign's actions did not reverse Flávio's advantage.	In the simulation, 1.1% of the electorate switches to Lula by Oct 25 and 0.6% goes to Flávio. What remains is to mobilize those who did not turn out.
Mauricio Moura, Oct 21	In the post-pandemic world, incumbents lose over perceived prices and the election as a plebiscite, and those who offer hope hold on.	In Lula's camp, hope fell from 41% to 18% after the debate, and anger rose to 52%.
Analysis of 850,000 words, Oct 21	Lula speaks more about foreign policy, the economy and education, and Flávio about politics, security and democracy.	In the reception of the debate, both camps swapped these agendas for confrontation, corruption and spectacularization.

The debate was won on ratings and lost on energy, and the lasting effect depends on communication until Oct 25

The Band debate expanded the dominance of Lula's camp in the electoral conversation, which came to gather 53% of interactions, and gave it a rating advantage, but it transformed the register of its base, which swapped hope and pride for indignation and contempt and issued fewer calls to vote. In Flávio's camp, the debate heightened contempt and spectacularization, with no comparable change in energy.

The following day, Flávio's camp regained ground and won the dispute over clips, while Lula's base partly resumed calling for votes without recovering hope. Translated into the simulation, this reception has a small, negative net effect for Lula, of -0.9 point in the chance of a comeback, which stands at 41.5% in the main scenario, with the current context, and at 35.8% at the lower bound, without it. What can move the race until October 25 are polls with fieldwork entirely after the debate, the clips that circulate and each campaign's ability to restore its base's energy.

The appendix details each stage of the study, from data collection to the chance of winning, with the equations, the parameters and their sources

This appendix gathers, for specialist reading, what the body of the study summarizes. It is organized in the order in which the data move through the analysis, starting with the corpus and the unit of analysis (A), moving through the classification instrument and the reading of the political camp (B), the estimation of proportions, intervals and concentration (C), and the focus groups and complementary sources (D), and arriving at the models that translate reception into an effect on the vote, namely the synthetic population (E), the agent-based model with the conjunctural mechanisms (F), the analytical funnel (G) and the outcome model (H).

The appendix closes with the passage from the simulated distribution to the chance and the projection (I) and with the conditions of reproducibility and the limits of the design (J). Each set of equations is followed by a table with the meaning of each symbol, the value or range adopted and its origin, whether a measure from Orikom®, public data, a result from the literature or an assumption declared as such. The values are the same ones that produced the study's results, extracted from the code of the analyses and simulations itself.

The corpus brings together the electoral conversation classified by Orikom® in two comparable windows, before and during the debate

The unit of analysis is the public post on social media and news portals collected by Orikom® on Instagram, X, TikTok, YouTube, news portals and the ad library, and already classified by the platform's questionnaire, in the version in force in October 2026, considering only the most recent classification of each post. The corpus includes posts that mention Lula, Flávio Bolsonaro, the election, the runoff or the debate, either in the text, through a regular expression applied to the lowercased text, or in the canonical entities recognized by the platform.

The debate window runs from 7 p.m. on October 18 to midnight on October 19, Brasília time (from 10 p.m. on Oct 18 to 3 a.m. on Oct 20 UTC), and is divided into debate night and the following day; the baseline runs from midnight on October 15 to 7 p.m. on October 18. The extraction was redone on the morning of October 20, with the collection and metrics for October 19 complete, and posts from October 20 are left out because their metrics are still accumulating.

The date of each post is its publication date on the platform, to the hour, and, in its absence, the collection date. In the debate window, all posts were read for political camp, and in the baseline the highest-reach posts and a random sample of the rest were read, with seed 1910; together they account for 91% of the period's interactions and are the only ones that enter the comparisons by camp. The debate clips are the posts about the debate whose text mentions a clip, excerpt, passage, moment, video or answer, or speaks of going viral, owning, humiliating, destroying or crushing the opponent.

Because Orikom® prioritizes, for each topic, day and source, the highest-reach posts, the corpus is a sample of the most exposed conversation, not a census of everything that was published. This design is consistent with the weighting adopted, which measures public exposure, but it implies that low-reach conversations, however numerous, carry little weight in the results.

The main measure is the sum of each post's interactions, and views serve as a check

For each post, interactions are the sum of likes, comments and shares, and views are the number of impressions reported by the platform. Some platforms return negative values as a marker of an unavailable metric, so each component enters as the larger of itself and zero, which prevents a technical marker from reducing the sum. Metrics were read at extraction, on the night of October 19, and continue to grow afterwards, especially for the most recent posts.

Interactions are the main measure because they record an action by the public in response to the content and exist on all platforms, whereas views are missing on some of them and follow different

counting criteria. Each camp's share was calculated with both measures and points in the same direction, since Lula's camp goes from 47% to 36% of views, and Flávio's, from 33% to 24%.

Interactions do not distinguish approval from rejection, nor distinct people from repetition, and are therefore treated as a measure of exposure and attention, not of support. A hostile comment on a post from Lula's camp counts as an interaction with Lula's camp, which is appropriate for measuring which discourses the public saw and reacted to, but not for inferring its adherence.

Each post is classified by a single questionnaire of 19 constructs, with a closed vocabulary and an applicability layer

Orikom®'s classification submits the text of each post, in a single call, to a language model, DeepSeek V4.1 Flash, at temperature zero and without extended reasoning, instructed by a fixed questionnaire, the same for the entire collection, with 19 theoretical constructs. Each construct has a closed vocabulary of categories, defined in the questionnaire itself with examples, and an applicability layer, which separates the post in which the construct does not apply from the one in which it applies and is negated, a distinction needed so that the absence of a trait is not read as its negation.

The questionnaire is identical in every call, and the variable content goes only in the message with the text, so that all posts are measured by the same instrument. Only the text is sent to the model, without author, profile, address, metrics or identifiers, which

complies with LGPD data minimization and prevents the model from classifying by the author rather than by the content. Temperature zero makes the classification reproducible, and categories outside the vocabulary are normalized, when they are spelling variants, or discarded at validation.

The stability of the instrument was measured in an audit of the Orikom® collection, in which two versions of the questionnaire classified the same posts, with agreement of 71% on valence, 80% on emotions, 81% on the Care foundation and 93% on the Authority foundation. There is no parallel human coding for this corpus, and the results should be read as the measure of an automated, stable and transparent instrument, not as a judgment validated by experts.

The constructs used in the study, their categories and the framework for each

CONSTRUCT	CATEGORIES	FRAMEWORK
Emotions	hope, pride, joy, surprise, indignation, anger, contempt, disgust, fear, sadness	Marcus, Neuman and MacKuen (2000)
Moral foundations	care, equality, proportionality, loyalty, authority, purity, liberty, each as virtue, violation or both	Graham, Haidt and Nosek (2009); Atari et al. (2023)
Value orientations	self-transcendence, conservation, self-enhancement, openness to change	Schwartz (1992; 2012)
Republican values	accountability, transparency, common good, impersonal rule of law, separation of public and private, civic participation, combating patrimonialism	Orikom® vocabulary
Generic frames	attribution of responsibility, conflict, morality, human interest, episodic, thematic, strategic game, war	Semetko and Valkenburg (2000); Iyengar (1991); Cappella and Jamieson (1997)
Issue-specific frames	moral corruption, spectacularization, culture war, people versus elite, defense of order, threat to democracy and eight others	Entman (1993); Orikom® vocabulary
Valence and polarization	positive, neutral, negative; low, moderate, high polarization	Orikom® vocabulary
Narrative roles	aggressor, victim and protector, assigned to cited entities	Orikom® vocabulary
Disinformation, causality and engagement	8, 4 and 7 categories, classified but not analyzed in this study	Orikom® vocabulary



Political camp and debate assessment were read separately, because Orikom®'s stance refers to the topic and not to the candidate

The stance recorded by Orikom® is favorable, opposed or neutral with respect to the topic of the post, not to a candidate, so that a post against a scandal can serve Lula or Flávio depending on the target. To compare the camps, each post received a second reading, with its own questionnaire, asking which camp it belongs to (Lula, Flávio, a third party or critic of both, neutral, or outside the election), how it assesses each candidate's performance in the debate (good, mixed or poor), what the predominant emotion is, what mobilization it calls for (converting, urging people to vote, calling them to the streets or asking for sharing) and whether it mentions a scandal or a proposal, with the instruction to judge irony by its meaning.

The reading used the same model, at temperature zero, on the first 600 characters of each text, without addresses, in batches of six

numbered texts, with a structured response in the same order. When the provider's content filter rejects a batch, the texts are reread one by one, so that the rejection of one does not eliminate the others, and those still rejected remain unread and outside the analyses by camp. The readings are stored per post, which makes it possible to reproduce all aggregates without a new call to the model.

Camp is a property of the content, not of the author, so the same account can post in different camps, and a neutral press post can gain engagement from either side. Separating camp from the constructs makes it possible to ask, for example, which emotions circulated in Lula's camp without confusing emotion with position.

All proportions in the study are weighted by interactions, with intervals obtained by resampling the posts

Estimation equations

weighted proportion, bootstrap, difference between windows and concentration

$$(1) w_i = \max(c_i, 0) + \max(m_i, 0) + \max(s_i, 0)$$

$$(2) \hat{p}_k = \sum_i w_i \cdot x_{ik} \div \sum_i w_i$$

$$(3) \hat{p}_k^{(b)} = \sum_i w_i^{(b)} \cdot x_{ik}^{(b)} \div \sum_i w_i^{(b)}, b = 1, \dots, 1,000$$

$$(4) CI_{95\%} = [Q_{2.5}(\hat{p}_k^{(b)}), Q_{97.5}(\hat{p}_k^{(b)})]$$

$$(5) \Delta_k = \hat{p}_k^D - \hat{p}_k^B, CI \text{ of } \hat{p}_k^{D(b)} - \hat{p}_k^{B(b)}$$

$$(6) G = 1 + 1/n - (2/n) \cdot \sum_j L_j, L_j = \sum_{l \leq j} w_{(l)} \div \sum_l w_l$$

PROPORTION, RESAMPLING, DIFFERENCE AND CONCENTRATION

The equations that produce all the proportions, intervals and differences in the study and the measure of concentration of interactions. The symbols are on the next slide.

EQUATIONS (2) TO (5)

Equation (2) is the weighted proportion, the share of interactions that fell on posts with trait k. Equation (3) repeats the calculation in 1,000 resamples of the posts, with replacement, and (4) takes the 2.5th and 97.5th percentiles as the interval. Equation (5) compares the windows with independent resamples, and (6) is the Gini coefficient of the Lorenz curve of interactions.

WHY RESAMPLE THE POSTS

Weighting approximates public exposure, and bootstrapping the posts carries into the interval the unequal weight of the highest-reach posts, which the usual formula for the error of a proportion would ignore (EFRON; TIBSHIRANI, 1993).

What each symbol in the estimation equations means

SYMBOL	WHAT IT IS	VALUE OR DEFINITION
i	post in the corpus, in a window and a camp	unit of analysis
c_i, m_i, s_i	likes, comments and shares of the post	platform metrics, collected by Orikom®
w_i	weight of the post, equal to its interactions	sum of the three metrics, with negative values set to zero
x_{ik}	indicator that the post has trait k	1 if it does, 0 if it does not; a post can have several traits
$\hat{p}_k$	weighted proportion of trait k	0% to 100%; the traits of a construct do not sum to 100%
(b)	index of the resample with replacement	1,000 resamples, seed 1910
$Q_{2.5}$ and $Q_{97.5}$	percentiles of the distribution of resamples	bounds of the 95% interval
D and B	debate window and baseline	Δ_k is distinguishable from zero if the interval does not include zero
$G, L_j, w_{(i)}, n$	Gini, Lorenz curve, interactions in ascending order and number of posts	G ranges from 0, equality, to 1, total concentration

Interactions are highly concentrated, especially in the debate window, which justifies the resampling intervals

INDICATOR	DEBATE	BASELINE	LULA'S CAMP, DEBATE	FLÁVIO'S CAMP, DEBATE
Share of interactions in the top 1% by reach	47%	26%	47%	44%
Share of interactions in the top 10 by reach	17%	11%	29%	25%
Gini coefficient of interactions	0.93	0.75	0.92	0.91



Differences are read through the interval, with caution regarding multiple comparisons and dependence between posts

A difference between windows is treated as distinguishable from zero when its 95% interval does not include zero. Because the study examines eighteen indicators in each camp, some difference could appear distinguishable by chance, so the interpretation rests on the joint pattern, consistent across emotions, moral foundations, values, frames and mobilization, and not on isolated indicators. No formal correction for multiple comparisons was applied, and the intervals should be read as descriptive.

The bootstrap assumes that posts are independent units, which is not exact when the same piece is reposted by coordinated profiles or when replies form chains, situations that would tend to narrow the

intervals. Concentration is also why the intervals are wide, since, with few posts accounting for a large share of interactions, each resample that includes or excludes them shifts the proportion considerably.

As a check, all proportions were also calculated without weighting, each post counting as one, and they point in the same direction, with smaller magnitudes. In Lula's camp, for example, hope goes from 41% to 24% of posts, and contempt from 17% to 32%, which indicates that the shift in register was sharper among the highest-reach posts.



In the focus groups, each statement received a card from each participant, and the balance per statement and per person enters the simulation

Three groups of eight voters from the city of São Paulo, recruited by declared vote intention for Lula, for Flávio Bolsonaro or as undecided, followed the debate in real time, in a collaboration between Agência de Comunicação Troika and IPSE Global. For each of the 19 statements analyzed, each participant showed a green card for approval, a yellow card for doubt or a red card for disapproval, and at the end of each block the groups answered who did better, who came across as more truthful, who was more aggressive and whom they would vote for.

For each candidate, the balance is the sum of green cards minus red cards on his statements, divided by the number of statements and by the number of participants, that is, $S = \Sigma(V - R) \div (F \cdot n)$, which ranges from -1, when everyone disapproves of every statement, to

+1, when everyone approves of all of them. Among the undecided, the balance was +0.156 for Lula's statements and -0.025 for Flávio's, and the difference, 0.181, is the lower bound of the assessment advantage used in the debate simulation. The upper bound, 0.228, is the difference between each candidate's assessment balances within his own camp, measured on social media by Orikom®.

The groups are not a probability sample, and their results describe these voters without, by themselves, extending to the electorate. In the simulation, they serve to delimit a plausible range of the assessment effect, not to estimate prevalence. Participants' statements appear only in paraphrase, as provided for in the consent form.



Searches, audience, transcript and chat were aligned to the same time axis as the broadcast

Google Trends search interest was recorded minute by minute, from 4:10 p.m. to 10:03 p.m. on October 18, for Lula, Flávio Bolsonaro and debate, on a relative scale in which 100 is the period's peak and the other values are proportional to it, and rising searches were recorded every two minutes. Because it is relative, the scale shows when attention rose and which term was searched most, but not how many people searched.

Audience comes from the Kantar Ibope preliminary figures for Greater São Paulo, in rating points, and from the peak of concurrent viewers on YouTube, as published by the press. The transcript comes from the broadcast's automatic captions, in 30-second

segments, and identifies the speaker and topic of each moment, which makes it possible to align reactions on social media, in searches and in the chat with what was being said.

The live chat was read in the full replay, without authors, and each message was assigned to a side and a tone based on its content, with the same language model. Paid messages were read one by one, with their amount. The chat brings together activists, automated accounts and paid messages, and is therefore treated as an indicator of each side's investment in the broadcast, not of the electorate's opinion.

The synthetic population reproduces the electorate polling station by polling station, with 7.1 million virtual voters

Tekoá®, IPSE Global's synthetic population platform, generates one agent for every 10 voters in the 254 cities of the IBGE urban concentrations that contain the state capitals and one for every 100 in the rest of the country, with at least three per polling station, distributed across the 514 thousand polling stations of 2026, which yields 7.1 million agents. Each agent's weight is the electorate of its polling station divided by the station's number of agents, so that totals by polling station, municipality and state match the TSE register, following the tradition of synthetic populations fitted to known margins (BECKMAN; BAGGERLY; MCKAY, 1996).

Each agent's attributes are drawn from 1,440 cells, combinations of sex, age, education, color or race, religion and per capita household income, based on the joint distribution of the 2022 Census sample in the state and in the urban or rural setting of the polling station. This distribution is adjusted by raking, iterative proportional fitting

(DEMING; STEPHAN, 1940), to the local margins, which are the sex, age and education profile of the polling station's electorate, with registration-based education blended half and half with the Census figure because it is outdated, the color or race of the 1 km surroundings of the polling place and the income corresponding to the decile of the median income of the household head in those surroundings.

Religion, which the Census publishes only in the sample, comes from the state's joint distribution, consistent with the other attributes, and occupation and means of transportation come from the same sample. Abstention, blank and null votes and votes for the other candidates have modest gradients by age, education and income, rebalanced to match each polling station's total. No agent corresponds to a real person, and the population contains no individual data on anyone.

The starting vote simultaneously matches each polling station's result and the vote profile by segment in the polls

Starting vote equations

for each agent i in polling station s , in the Tekoá® synthetic population

$$(1) \ n_s = \max(3, \lceil E_s \div r_s \rceil), \ \eta_i = E_s \div n_s, \ r_s \in \{10, 100\}$$

$$(2) \ p_i = \text{logit}^{-1}(\alpha_s + x_i' \beta)$$

$$(3) \ \alpha_s : \sum_{i \in s} p_i \div n_s = L_s \div (L_s + F_s)$$

$$(4) \ \pi_i^0 = 2 p_i - 1$$

$$(5) \ \pi_i = \frac{1}{2} \pi_i^0 + \frac{1}{2} \min(1, \pi_i^0 + 0.6) \text{ if voting for Lula}$$

$$(6) \ \pi_i = \frac{1}{2} \pi_i^0 + \frac{1}{2} \max(-1, \pi_i^0 - 0.6) \text{ if voting for Flávio}$$

$$(7) \ \pi_i \leftarrow \min(1, \max(-1, \pi_i + \varepsilon_i)), \ \varepsilon_i \sim N(0, 0.08)$$

WEIGHT, STARTING VOTE AND PREDISPOSITION

The equations that give each agent its weight, its chance of voting for Lula and a continuous predisposition, from -1 , the committed Bolsonaro supporter, to $+1$, the Lula supporter. The symbols are on the next slide.

FROM THE POLLING STATION RESULT TO THE AGENT

Equation (1) defines how many agents the polling station has and how many voters each represents. Equations (2) and (3) form a logit in which the profile effects come from the PoderData margins of Oct 13–15 and each polling station's intercept is solved by Newton iterations until the agents' result reproduces the ballot count. From (4) to (7), the chance becomes a predisposition, pulled toward the side of the actual vote and with a small amount of noise.

WHY CALIBRATE TWICE

The continuous predisposition is what allows the model to distinguish the committed voter from the voter in the middle, where persuasion is possible (ZALLER, 1992), and the double calibration prevents the poll profile from contradicting the actual geography of the vote.

What each symbol in the starting vote equations means

SYMBOL	WHAT IT IS	VALUE OR ORIGIN
s, E_s	polling station and its eligible electorate	TSE, 2026
n_s, r_s	agents in the polling station and voters per agent	10 in the 254 cities, 100 elsewhere, minimum of 3 agents
η_i	voters represented by the agent	$E_s \div n_s$
x_i, β	agent profile and effects of sex, age, education, income and religion	PoderData margins, Oct 13–15, 3,000 interviews
α_s	polling station intercept	solved to reproduce the polling station result
L_s, F_s	votes for Lula and for Flávio in the polling station	TSE, 2026 first round
p_i	individual chance of Lula versus Flávio	0 to 1
π_i	predisposition	from -1, committed Bolsonaro supporter, to +1, Lula supporter
0.6 and ε_i	shift toward the side of the actual vote and individual noise	assumption; normal noise with standard deviation 0.08

Each agent talks with about ten others, has an openness to changing its mind and an exposure that varies with age

The network links each agent to about ten others, in four layers. Within the polling station, agents are ordered by predisposition, with noise of standard deviation 0.15, and each one is linked to the two neighbors on each side in that order, which produces homophily (MCPHERSON; SMITH-LOVIN; COOK, 2001). Within the municipality, the same procedure links each agent to one neighbor on each side, and evangelicals gain a tie to another evangelical in the municipality. Finally, two random ties within the state shorten distances, as in small-world networks (WATTS; STROGATZ, 1998), and all ties are symmetric.

Permeability, each profile's openness to changing its mind, comes from IPSE Global's 46 high-frequency focus groups conducted in Brazil between November and December 2025, with 510 participants. For each participant, it is the balance between the annotated relations of openness, such as changing one's mind,

being persuaded or agreeing, and those of closure, such as resisting, demanding proof or polarizing, divided by the total plus two, which attenuates cases with few annotations. A ridge regression (HOERL; KENNARD, 1970) maps this measure onto the profile, and the prediction for each agent is normalized to a mean of 1 and bounded between 0.6 and 1.4.

Exposure to social media is multiplied by 1.3 among voters aged 16 to 24, 1.2 among those aged 25 to 34, 1.0 among those aged 35 to 44, 0.85 among those aged 45 to 59 and 0.6 from age 60 onward, and exposure to TV by roughly inverse factors, from 0.7 to 1.3. First-round abstainers have half the attention of the others. The focus groups provide structure, that is, what moves whom, and not prevalence, which comes from the polls, the Census and the ballot boxes.

Each day, each agent can be reached by social media and by TV, and the chance of changing is highest in the middle and nearly zero at the extremes

Agent-based model equations · exposure and persuasion

for each agent i and each day t , from October 15 to 25

$$(1) \ c_i = \exp(-\pi_i^2 \div (2 \cdot 0.25^2))$$

$$(2) \ s_i = \min(1, A \cdot c_i \cdot \kappa_i), \ A = 2\varepsilon \div \bar{c}_{target}$$

$$(3) \ p_{on} = \min(1, V \cdot k \cdot u \cdot f \div (0.55 \cdot N_v))$$

$$(4) \ O_{it} \sim \text{Bernoulli}(\min(1, p_{on} \cdot \varphi_i^{on}) \cdot a_i)$$

$$(5) \ T_{it} \sim \text{Bernoulli}(\min(1, \tau \cdot \varphi_i^{tv}) \cdot a_i)$$

$$(6) \ p_{it}^{media} = 1 - (1 - O_{it} \cdot m_i s_i \alpha)(1 - T_{it} \cdot m_i s_i \alpha_{TV})$$

DAILY REACH AND CHANCE OF CHANGE

The equations that determine, each day, whether an agent is reached by social media and by TV, and with what chance the message leads them to change position. The symbols are listed in the parameter tables.

FROM THE ACCEPTANCE CURVE TO THE CALIBRATED EFFECT

Equation (1) is the acceptance curve, highest in the middle, where predisposition is zero, and almost null at the extremes. Equation (2) scales this curve so that the mean effect among those who can change matches that of the experiments, doubled because they include those who already vote for the candidate. Equations (3) to (5) draw daily exposure, and (6) combines the two media.

RECEIVING AND ACCEPTING THE MESSAGE

The curve expresses, in simplified form, the idea that change requires receiving and accepting the message, and that those with a strong predisposition reject what contradicts it (ZALLER, 1992). The calibration anchors the effect size in experimental evidence (KALLA; BROOCKMAN, 2018; COPPOCK; HILL; VAVRECK, 2020).

Conversation with neighbors amplifies the message, the effect fades over time, and the stock on the last day becomes votes

Agent-based model equations · conversation, memory and vote

for each agent i and each day t ; the final sum gives the shift in points

$$(1) \ n_{it} = \sum_j A_{ij} \cdot (\omega_j + M_{j,t-1})$$

$$(2) \ C_{it} = 1 - (1 - 0.1 \cdot s_i \cdot a_i)^{n_{it} + b_i}$$

$$(3) \ P_{it} = 1 - (1 - P_{it}^{media})(1 - C_{it})$$

$$(4) \ M_{it} = (M_{i,t-1} \vee \text{Bern}(P_{it})) \wedge \neg \text{Bern}(1 - \rho), \rho = 0.5^{1/h}$$

$$(5) \ \Gamma = 100 \cdot \sum_i \eta_i \cdot v \cdot W_i \cdot M_{i,10} \div (2 \cdot N_v)$$

$$(6) \ \Gamma_{total} = \Gamma_{conversion} + \Gamma_{turnout} - \Gamma_{reaction}$$

NEIGHBORS, FORGETTING AND FINAL SUM

The equations for conversation between neighbors, forgetting and the final sum, which turns the agents who changed into points of vote shift.

FROM CONVERSATION TO VOTE SHIFT

Equation (1) counts the neighbors who support Lula or have already changed, with greater weight for activists. Equation (2) gives each of them a chance of persuading the agent, and (3) combines conversation and media. Equation (4) accumulates those who changed and makes part of them forget, with half-life h . Equation (5) converts the stock on the last day into points, and (6) adds conversion and turnout and subtracts Flávio's reaction.

WHY CONVERSATION IS HOMOPHILOUS

Conversation among acquaintances is the most persuasive channel and also the most homophilous, and the multiplicative form makes the effect depend on how many neighbors already think like Lula (KATZ; LAZARFELD, 1955; BAKER; AMES; RENNÓ, 2020). The weight W counts twice the voter who switches from Flávio to Lula, because it takes a vote from one and gives it to the other.

The exposure and persuasion parameters, the ranges drawn and their sources

SYMBOL	WHAT IT IS	RANGE OR VALUE	SOURCE
π_i, c_i	predisposition and acceptance curve	deviation of 0.25 around the middle	Zaller (1992)
ϵ	mean effect per exposure	0.1% to 0.7%	Kalla and Broockman (2018); Coppock, Hill and Vavreck (2020)
κ_i	profile permeability	0.6 to 1.4, mean 1	IPSE Global focus groups
V	daily views of Lula's camp	43.7 million	Orikom®, highest-reach posts, Oct 9–15
k, u	whole camp and distinct people per view	1.5 to 3; 0.3 to 0.6	assumption
f	share of the audience outside the camp	15% to 33%	Hart et al. (2009); Mundim et al. (2022)
α, α_{TV}	attention on social media and on TV	45% to 60%; 20% to 40%	Newman et al. (2025); assumption
τ	daily reach of TV and radio	20% to 40%	assumption; Gerber et al. (2011)
φ_i, a_i, m_i	exposure by age, attention and issue fit	0.6 to 1.3; 0.5 or 1; mean 1	assumption; Orikom®, Oct 13–17

The parameters for conversation, forgetting and conversion into votes

SYMBOL	WHAT IT IS	RANGE OR VALUE	SOURCE
A_{ij}	tie between agents i and j	about 10 per agent	polling station, municipality, church and state
ω_j	weight of the Lula voter in conversation	1, or k_a for activists	Baker, Ames and Rennó (2020)
0.1	chance of persuasion per neighbor, multiplied by s and a	0.05×2	Katz and Lazarsfeld (1955); assumption
M_{it}	the agent changed and still remembers on day t	0 or 1	simulation output
h, ρ	half-life of the effect and daily retention, $\rho = 0.5^{(1/h)}$	2 to 11 days	Hill et al. (2013)
v	share of the change that reaches the ballot box	70% to 95%	assumption
W_i	vote weight of those who change	2 from Flávio to Lula, in 60% of cases; 1 otherwise	assumption
abstainer	probability of voting among those who changed	30% to 70%	assumption
N_v	voters	79% of the eligible electorate	TSE, 2026 first round

The mechanisms of the final stretch enter as additions to the model, each with an explicit range

Equations of the campaign-context mechanisms

additions to the agent-based model, switched on according to the scenario

- (1) $\omega_j = 1 + (k_a - 1) \cdot Z_j \cdot D_t, Z_j \sim \text{Bernoulli}(\theta)$
- (2) $b_i = \chi \cdot D_t \cdot \bar{Z}_{mun(i)}$
- (3) $P_{it}^{deb} = \text{Bern}(q \cdot \varphi_i^{tv} a_i) \cdot \min(1, s_i \alpha_{TV} \Delta_{av} k_d)$
- (4) $D_t = 1 \text{ through Oct 18} ; D_t = \delta \sim U(0.459, 0.849) \text{ from Oct 19}$
- (5) $P_{it}^{comp} = \gamma \cdot D_t \div 10 \text{ if abstainer with } \pi_i > 0.2 \text{ and activist neighbor}$
- (6) $P_{it}^F = 1 - (1 - O_{it}^F s_i^F \alpha)(1 - T_{it} s_i^F \alpha_{TV})(1 - 0.1 s_i^F a_i r)^{nF}$
- (7) $m s_i \leftarrow m s_i \cdot \lambda_{cp} \cdot \lambda_{r2}, s_i^F \leftarrow s_i^F \cdot \psi_{cp} \cdot \psi_{r2}$

THE MECHANISMS OF THE FINAL STRETCH

The additions that represent the context of the final stretch, switched on according to the scenario, namely activists, the bridge, the debate, demobilization, turnout, Flávio's reaction and the middle of the pyramid.

ACTIVISTS, BRIDGE, DEBATE AND DEMOBILIZATION

Equation (1) gives activists, a fraction θ of Lula's voters, intensity k_a in conversation, and (2) creates the bridge with those who think differently in the municipality. Equation (3) is exposure to the debate on October 18, with an effect proportional to the evaluation advantage. Equation (4) reduces the base's energy from October 19 onward, and (5) is the turnout driven by activists. Equation (6) is Flávio's reaction, and (7), the middle of the pyramid.

SAME DRAWS IN ALL SCENARIOS

Each mechanism has a range and, where a measure exists, is calibrated by the social media reading or by the focus groups. All scenarios use the same draws in each run, so that the difference between them measures the mechanism, not chance.

The parameters for activists, turnout, interviews and the debate

SYMBOL	WHAT IT IS	RANGE	ORIGIN
θ, k_a	share of activists among Lula's voters and intensity of their conversation	10% to 30%; 2 to 4 times	field report; Green and Gerber (2019)
χ	bridge with those who think differently in the municipality	0.5 to 2.0	assumption
γ	chance of getting someone to vote within ten days	2% to 8%	Green and Gerber (2019)
interviews	audience, intensity and advantage on Oct 15 and 16	15% to 30%; 0.5 to 1.5; 0.248	Orikom®, net balance within the camp itself
q, k_d	debate audience and effect intensity	12% to 25%; 0.5 to 1.5	Kantar Ibope and YouTube; assumption
Δ_{av}	Lula's evaluation advantage in the debate	0.181 to 0.597	focus groups; Orikom®, debate night and Oct 19
δ	energy of Lula's base after the debate	0.459 to 0.849	reasons for hope and the call to vote in Lula's camp

The parameters for Flávio's reaction and for reception in the middle of the pyramid

SYMBOL	WHAT IT IS	RANGE	ORIGIN
r	intensity of conversation in Flávio's camp, relative to Lula's	0.2 to 0.4	field report; alternative measure 0.9
Flávio's reach	views of Flávio's camp that count	half of 25.0 million per day	Orikom®, Oct 9–15; field report
$\lambda_{cp}, \lambda_{r2}$	acceptance of Lula among the self-employed and those earning 2 to 5 minimum wages	0.6 to 0.9; 0.8 to 1.0	polls by income; focus groups
ψ_{cp}, ψ_{r2}	acceptance of Flávio in the same groups	1.1 to 1.4; 1.0 to 1.25	polls by income; focus groups
income of 1 to 2 min. wages	half the adjustment for the 2 to 5 minimum wage bracket	$(1 + \lambda) \div 2$	assumption

Each agent's persuasion depends on how much the message's issue speaks to their profile

Issue fit equation

multiplier of persuasion per exposure, with mean 1 in the observed mix

$$(1) F_{\tau} = \sqrt{e_{\tau} \div e_{overall}}$$

$$(2) \tilde{\rho}_{i\tau} = \rho_{i\tau} \div \bar{\rho}_{\tau}$$

$$(3) m_i^* = \sum_{\tau} \mu_{\tau} \cdot F_{\tau} \cdot (1 + \kappa (\tilde{\rho}_{i\tau} - 1))$$

$$(4) m_i = \max(0.02, m_i^* \div \bar{m}_{obs}^*)$$

ADJUSTMENT TO THE ISSUE MIX

The equation that adjusts each agent's persuasion to the issue mix of Lula's camp, depending on whether the issue speaks to their profile.

ISSUE STRENGTH AND RELEVANCE TO THE AGENT

Equation (1) is the strength of each issue, the square root of the ratio between interactions per post on the issue and those on the election in general, in the Orikom® collection from October 13 to 17. Equation (2) is the issue's relevance to the agent, relative to the mean, (3) sums the issues by their weight μ in the mix, and (4) normalizes to mean 1 in the observed mix.

THE OBSERVED MIX AND THE WEIGHTS

The observed mix was 71.6% evaluation and delivery, 26% 6×1 work schedule, 1.6% MEI and 0.8% zero fare. The relevance of 6×1 is higher among private-sector employees (1.6), that of MEI among the self-employed (2.0), and that of zero fare among public transport users (1.8), and κ , from 0.5 to 1.5, regulates how much relevance weighs.

The analytical funnel estimates, without a network, how much communication shifts and how many times the current reach would be needed for a comeback

Analytical funnel equations

one period per day, from October 15 to 25 ($t = 1$ to 10), for each of 20,000 draws

$$(1) M_t = \rho \cdot M_{t-1} + E_t, \rho = 0.5^{1/h}$$

$$(2) E_t = \min(N_v, V k u) \cdot f \cdot \alpha \cdot 2\varepsilon \cdot \beta \div N_v + \tau \cdot \alpha_{TV} \cdot \varepsilon \cdot \beta$$

$$(3) \Delta = v \cdot M_{10} = \Delta_{on} + \Delta_{TV}$$

$$(4) target = d \div 2, d = 2 \cdot (50 - 49.07) = 1.86 \text{ points}$$

$$(5) K = (target - \Delta_{TV}) \div \Delta_{on}$$

FROM EXPOSURE TO THE BALLOT BOX, WITHOUT A NETWORK

The equations of the analytical funnel, which estimates how much communication shifts by election day and how many times the current reach would be needed to cover the target.

STOCK, FUNNEL, TARGET AND MULTIPLIER

Equation (1) accumulates change with daily decay, (2) multiplies the funnel stages on social media and TV, and (3) carries the stock to the ballot box. Equation (4) sets the target at half the gap in the polls, because each voter who switches sides takes a vote from one and gives it to the other, and (5) gives the multiplier K of social media reach that would bring each draw to the target, with TV as it is.

TODAY'S MULTIPLIER AND ITS BASIS

At the median of the 20,000 draws, K is 3.7 times, with an 80% range of 1.3 to 11.7. The decaying stock form comes from evidence that the persuasive effect decays (HILL et al., 2013), and the multiplicative form from the reception-acceptance model (ZALLER, 1992), in which a single weak stage is enough to make the product small.

The analytical funnel parameters, ranges and sources

PARAMETER	RANGE USED	SOURCE
Daily views on the highest-reach posts (V)	43.7 million (Lula) and 25.0 million (Flávio)	Orikom®, October 9–15
Whole camp (k) and people per view (u)	1.5 to 3; 0.3 to 0.6	assumption
Audience outside the camp (f)	15% to 33%	Hart et al. (2009); Mundim et al. (2022)
Attention on social media (α)	45% to 60%	Newman et al. (2025), 47% avoid news in Brazil
Effect per exposure (ϵ)	0.1% to 0.7%	Kalla and Broockman (2018); Coppock, Hill and Vavreck (2020)
TV and radio reach and attention (τ , α_{TV})	20% to 40% and 20% to 40%	assumption; Gerber et al. (2011)
Half-life of the effect (h)	2 to 11 days	Hill et al. (2013); Coppock (2022)
Word of mouth (β) and arrival at the ballot box (v)	1 to 1.5; 70% to 95%	Katz and Lazarsfeld (1955); Baker, Ames and Rennó (2020); assumption
Voters (N_v) and gap in the polls (d)	125.3 million; 1.86 points	TSE; average of 17 polls, October 14–20

The multiplier measures the distance between what communication does and what a comeback would require, and it fell as the gap in the polls narrowed

The multiplier K answers a counterfactual question, that of how many times the daily views of Lula's camp on social media would need to grow, with TV and radio as they are, for communication alone to cover half the gap measured in the polls by October 25. Since, in the funnel, change is proportional to reach, K is the ratio between what remains to reach the target after TV and what social media produce today.

The value fell from 9.1 times on October 15 to 5.7 on the 18th, 4.8 on the 19th and 3.7 on the 20th, with no change in the communication parameters, because the average gap in the polls narrowed from 3.9 to 2.6, 2.26 and 1.86 points, and the target is half of it. The 80%

range, from 1.3 to 11.7 times, shows that the result depends above all on the effect per exposure and the half-life, the most uncertain parameters in the literature.

The funnel has no network and therefore does not capture the capillarity of conversation among acquaintances, which the agent-based model incorporates, nor mobilization outside the collected platforms, such as messaging groups and face-to-face conversation, which the Orikom® collection, centered on the highest-reach profiles and terms, observes only in part. K should therefore be read as an order of magnitude of the effort required, not as an exact measure.

The outcome model starts from the first round, redistributes the vote of the other candidates, adjusts to the polls and sums the uncertainties

Outcome model equations

for each region r and each of the 400,000 draws s

$$(1) \hat{L}_r = (L_r + a_r(1 - b)D_r) \div (L_r + F_r + (1 - b)D_r)$$

$$(2) a_r = \frac{1}{4} a_r^{DF} + \frac{1}{4} \bar{a}^{DF} + \frac{1}{2} a_r^{TSE} + \delta$$

$$(3) \delta : \sum_r V_r \hat{L}_r \div \sum_r V_r = 49.07\%$$

$$(4) Lula_r = \hat{L}_r + c + e_n + e_r, e_n \sim N(0, 2.5), e_r \sim N(0, 1.5)$$

$$(5) Margin = \sum_r V_r (2 Lula_r - 1) + \sum_{uf} \Delta C_{uf} (2 \ell_{uf} - 1)$$

$$(6) P(win) = (1 \div 400,000) \cdot \sum_s 1[Lula^{(s)} > 50\%]$$

FROM THE FIRST ROUND TO THE RUNOFF

The equations of the outcome model, which starts from the first round in each region, redistributes the vote of the other candidates, adjusts the level to the polls and adds communication and historical errors.

REDISTRIBUTION, REGIONAL PATTERN AND ERRORS

Equation (1) converts the first-round vote into a runoff vote, removing those who vote blank or null. Equation (2) combines the regional pattern from Datafolha, with partial pooling, and that of the ballot boxes, and (3) shifts all regions equally to the average of the 17 polls. Equation (4) adds communication and errors, (5) converts into votes with turnout, and (6) counts the draws in which Lula exceeds 50%.

ANCHORING IN THE ACTUAL VOTE

Starting from the first round anchors the model in the actual vote, partial pooling avoids taking the noise of regional subsamples at face value, and the errors have the size measured between the mid-October Datafolha and the ballot box in the runoffs from 2006 to 2022, consistent with the error of polls in the final stretch across 45 countries (JENNINGS; WLEZIEN, 2018).

Each component of the outcome model has a value or range and a source

SYMBOL	WHAT IT IS	VALUE OR RANGE	SOURCE
L_r, F_r, D_r	votes for Lula, Flávio and others in the 1st round, by region	45.2%, 47.0% and 7.8% of valid votes nationwide	TSE
b	share of others' voters who vote blank or null	30% to 45%	Quaest, October 10–13
$a_r^{DF}, \bar{a}^{DF}$	share of others' voters who go to Lula, by region and on average	Southeast, South and Northeast; North and Center-West by the average	Datafolha, October 13 and 14
a_r^{TSE}	the same share, estimated from polling stations	N 0.27; NE 0.45; CW 0.37; SE 0.41; S 0.38	TSE; Goodman (1953); King (1997)
δ	common shift to the poll average	solved by bisection	17 polls, October 14–20
c	communication balance, in points	normal, median 0.50 and SD 0.23 with the debate	agent-based model, 2,000 runs
e_n, e_r	national and regional poll error	SD of 2.5 and 1.5 points	Datafolha and ballot box, 2006 to 2022
$V_r, \Delta C_{uf}, \ell_{uf}$	valid votes in the region, change in turnout and Lula's share among those who enter or leave	see the next slide	TSE; Canzian (2026); Dias (2026)

Turnout is drawn state by state, using the historical series, the state runoffs and the vote of those who enter and leave

Turnout equations

change in abstention between rounds, state by state, in each draw

- (1) $\Delta_{nac} = y + v - \mu, v \sim N(0, 0.5), \mu \sim U(0, 1)$
- (2) $y \in \{2.24, 3.38, 1.71, 0.97, -0.36\}, \text{weights } \{0.15, 0.15, 0.15, 0.15\}$
- (3) $\Delta_{uf} = \Delta_{nac} - g_{uf} \cdot U(0.5, 1.5) + N(0, 1)$
- (4) $\Delta C_{uf} = -\Delta_{uf} \cdot E_{uf} \div 100$
- (5) $\ell_{uf} = \ell_{uf}^0 + U(-0.12, 0.02) \text{ if } \Delta C > 0; \ell_{uf}^0 + U(0.02, 0.10) \text{ if } \Delta C < 0$

WHO VOTES IN THE RUNOFF

The turnout equations, which draw the change in abstention between rounds in each state and the vote of those who enter and of those who leave.

CHANGE IN ABSTENTION STATE BY STATE

Equations (1) and (2) draw the national change from the 2006–2022 series, with greater weight for 2022, when there was explicit mobilization as now, and add uncertainty and a mobilization effect of up to 1 point. Equation (3) subtracts about one point in the six states with a gubernatorial runoff, where g equals 1, and adds a state-specific deviation. Equation (4) converts into voters, and (5) gives Lula's share among those who return and those who leave.

WHO ENTERS AND WHO LEAVES

Those who stop voting are poorer and lean toward Lula, and those who return, judging by the 2022 polling stations, lean slightly toward Flávio, although 2026 polls suggest the opposite, so the ranges cover both directions. The 2022 zero fare did not change turnout (PEREIRA et al., 2023).

In the runoffs from 2002 to 2022, the average of last-week polls erred little and almost always in favor of the PT

ELECTION	POLLS IN THE LAST WEEK	PT AVERAGE IN VALID VOTES	BALLOT BOX (TSE)	ERROR OF THE AVERAGE
2002	5	64.46%	61.27%	+3.19
2006	6	61.53%	60.83%	+0.70
2010	9	56.64%	56.05%	+0.59
2014	11	51.83%	51.64%	+0.19
2018	11	43.85%	44.87%	-1.02
2022	19	50.91%	50.90%	+0.01
2026, 1st round (Lula in the two-way split)	15 polling firms	51.0%	48.99%	+2.0



The model uses the poll average without a discount, because the first-round error does not tend to repeat in the runoff

In five of the six presidential runoffs from 2002 to 2022, the average of polls with fieldwork completed in the last week overestimated the PT candidate, by 0.61 points on average, or 0.39 points at the median, with a root mean square error of 1.4 points. The polls come from the polling firms' reports and press coverage at the time, and the result from the Tribunal Superior Eleitoral. In the first round of 2026, the 15 polling firms with fieldwork in the preceding ten days underestimated Flávio by 4.0 points of valid votes on average, which is equivalent to overestimating Lula by 2.0 points in the race between the two.

The model does not discount this error. After the first round, polling firms had the actual result available to calibrate samples and weights, and in 2018 and 2022, when the first round also underestimated the right-wing candidate, the runoff average did not repeat the error, falling 1.0 point below the PT's result in 2018 and matching it exactly in 2022. In addition, Lula's campaign is now more active in communication, which the simulation already incorporates. A 0.5-point discount would bring Lula's chance to 34.3% in the scenario with the campaign context and to 29.0% in the hard scenario.

The three scenarios differ only in the communication balance, and each is drawn 400,000 times

SCENARIO	COMMUNICATION BALANCE (C)	LULA, MEDIAN AND 80% RANGE	LULA'S CHANCE
Hard	analytical funnel, with both campaigns effective; median of 0.08 points, SD 0.32	49.04% (45.65% to 52.41%)	35.8%
With context, without the debate	agent-based model; median of 0.54 points, SD 0.24	49.50% (46.12% to 52.87%)	42.4%
With the campaign context and the debate	agent-based model; median of 0.47 points, SD 0.22	49.43% (46.06% to 52.80%)	41.5%



The chance is the share of draws in which Lula wins, and the projection shows the entire distribution, not a scoreline

The chance of winning is the proportion of the 400,000 draws in which Lula exceeds 50% of valid votes. The communication balance enters as a normal distribution with the median and standard deviation of the 2,000 runs of the agent-based model, the latter obtained from the distance between the 10th and 90th percentiles divided by 2.563, which is the distance between these percentiles in a standard normal. The projection presented in the study is the median, the value that splits the draws in half, with the range containing 80% of them.

The conditional medians describe the typical result when each candidate wins. In the scenario with the debate, when Lula wins, the median is 51.6% of valid votes, with a range of 50.3% to 54.0%, and

when Flávio wins, 52.0%, with a range of 50.4% to 54.7%. The margin ranges cover all draws, with Flávio winning by more than four points in 29.3% of them, by up to four in 29.2%, and Lula winning by up to four in 25.0% and by more than four in 16.4%.

The distribution is not an electoral forecast but the translation, into probability, of what the polls measure today, of the error they have had in the past and of the plausible effect of communication, and it changes with each new poll. Since only three polls in the average, Real Time Big Data, Alfa and Instituto França, have part of their fieldwork after the debate, the debate effect lies almost entirely in the simulation, and polls with fieldwork entirely after it will show whether the reception measured here has turned into votes.

The results are reproducible, with fixed seeds, common random numbers and cross-checks

The draws use fixed seeds: 1910 for the baseline sample and the bootstrap, 1810 and 1710 for the agent-based model parameters, 20261025 for the analytical funnel and 25102026 for the outcome model. The agent-based model scenarios share the same random numbers in each run, so that the difference between scenarios reflects the mechanism rather than chance. The 2,000 runs per scenario over the 7.1 million agents were executed on GPU.

Before receiving the expanded population, the outcome model was checked against the values of the previous version, and the decomposition by microsegments, run separately, exactly reproduced the ranges of the scenario with the debate. The language model readings are stored per post, with no text or author in the aggregates, and every figure in the study can be recalculated from them without a new call to the model.

The design's limitations lie in its explicit assumptions, in the coverage of data collection and in the automated nature of the classification

Parameters without direct measurement, such as the share of views that reaches distinct people, TV reach, the extent to which change reaches the ballot box, activist intensity and demobilization, enter as ranges rather than values, and the uncertainty they produce appears in the results. Even so, the ranges are analytical choices, and other researchers could adopt different ones. The demobilization of Lula's base, in particular, is a hypothesis calibrated by the decline in hope, not a behavioral measure.

Data collection prioritizes the profiles and terms with the greatest reach and does not cover private messaging groups, and the metrics of the most recent posts are still growing, which underrepresents the day after the debate. The classification is automated and stable, but without parallel human coding in this corpus, and irony and ambiguity are known sources of error. The outcome model depends on the polling average, all with fieldwork prior to the debate, and later polls may shift the chance in either direction.

About the platforms and this scope

👁 WHAT THIS STUDY IS

Study by IPSE Global in collaboration with Agência de Comunicação Troika on the reception of the Band presidential debate of October 18, 2026 on social media and its simulated effect on the runoff vote. It combines the classification of the electoral conversation by the Orikom® platform, focus groups monitored in real time, Google searches, the broadcast chat and transcript, audience ratings, 17 voting intention polls and simulations in the Tekoá® synthetic population.

👁 CORPUS AND WINDOWS

Electoral posts collected by Orikom® on Instagram, X, TikTok, YouTube, news portals and ads that mention Lula, Flávio Bolsonaro, the election, the runoff or the debate, in the text or in the recognized entities. Debate window, from 7 p.m. on Oct 18 to midnight on Oct 19 (Brasília time), with 84.9 million interactions and 344 million views, divided into debate night and the following day.

Baseline, from Oct 15 to 7 p.m. on Oct 18, in which the posts with the greatest reach and a random sample of the others, together accounting for 91% of the period's interactions, were read for camp. Only posts

already classified by Orikom®, which prioritizes those with the greatest reach in each topic, day and source, are included.

The extraction was redone on the morning of Oct 20, when collection and metrics for Oct 19 were already complete, and posts from Oct 20 are excluded because their metrics are still accumulating.

About the platforms and this scope

▮ CLASSIFICATION OF CONSTRUCTS

Each post was classified by the Orikom® monolithic questionnaire, with 19 constructs in a single call to a language model (DeepSeek V4.1 Flash, temperature zero, no extended reasoning), a closed vocabulary per construct and an applicability layer, which distinguishes an absent construct from a negated one.

This study uses emotions (ten categories), generic frames (attribution of responsibility, conflict, morality, human interest, episodic, thematic, strategic game and war), issue-specific frames, moral foundations in seven dimensions with a positive, negative or both poles, Schwartz value orientations, republican values, valence, polarization, disinformation and narrative roles (aggressor, victim, protector).

Only the text goes to the model, with no author, metrics or address. In an audit of the Orikom® archive, agreement between two versions of the questionnaire was 71% for valence, 80% for emotions, 81% for the care foundation and 93% for the authority foundation. There is no parallel human coding for this corpus, and the results should be read as the measurement of an automated and stable instrument, not as expert-validated judgment.

▮ READING OF THE FIELD AND THE EVALUATION

The political camp of each post (Lula, Flávio, third party or critic of both, neutral, outside the election), the assessment of each candidate's debate performance (good, mixed, poor), the predominant emotion, the mobilization requested (convert, call to vote, street, share) and any mention of a scandal or proposal were read separately by a language model, in batches of six texts, with the same questionnaire for all posts in the debate window and for those read in the baseline.

About the platforms and this scope

👁 WEIGHTING, INTERVALS AND DIFFERENCES

Proportions are the share of interactions (likes, comments and shares) on posts with each feature, by camp and window. 95% intervals from a bootstrap of 1,000 resamples of posts; differences between windows with independent resampling of each window. Concentration measured by the share of interactions in the top 1% and in the top 10 posts by reach and by the Gini coefficient.

Without weighting, hope in Lula's camp falls from 41% to 24% of posts, and contempt rises from 17% to 32%, in the same direction as the weighted results.

👁 THREE QUALITATIVE GROUPS

Three groups of eight voters from the city of São Paulo, 24 in total, made up of those who declare a vote for Lula, those who declare a vote for Flávio Bolsonaro and undecided voters, watched the debate in real time, in a collaboration between Agência de Comunicação Troika and IPSE Global.

For each of the 19 statements analyzed, each participant showed a green, yellow or red card, and at the end of each block the groups

answered who did better, who came across as more truthful, who was more aggressive and whom they would vote for. The statements appear only in paraphrase, as provided for in the consent form, and the findings describe these groups without, in themselves, extending to the electorate.

👁 SIMULATION · THE SYNTHETIC POPULATION

Tekoá®, IPSE Global's synthetic population platform, reproduces the electorate with 7.1 million virtual voters, one for every 10 voters in the 254 cities of IBGE's urban concentrations and one for every 100 elsewhere, distributed across the 514 thousand polling stations.

Each agent has a sex, age, education, race, religion, income, occupation, municipality and neighborhood, adjusted to the profile of the polling station and to the 2022 Census, starts from the actual first-round vote of their polling station and talks with about ten others, at the polling station, in the municipality, at church and in the state.

About the platforms and this scope

▮ SIMULATION · SCENARIOS AND OUTCOME MODEL

Each campaign scenario runs 2,000 times with the same draws.

The debate enters as exposure of 12% to 25% of the electorate, with an effect proportional to Lula's evaluation advantage, drawn between the net balance among the undecided in the focus groups and that measured on social media on debate night and the following day, and with a loss of energy in Lula's base from Oct 19 onward, drawn between the measured decline in hope in his camp and the partial recovery of calls to vote.

The outcome model starts from each region's first-round vote, adjusts the national level to the average of the 17 polls and combines, in 400 thousand draws, the campaign effect with a national error of 2.5 points and regional errors of 1.5 points.

👁 POLLS

Simple average of 17 national runoff polls with fieldwork ending Oct 14–20, giving Lula 49.07% of valid votes: Datafolha (Oct 13–14, 2,520 interviews, BR-00466/2026), Indexa (Oct 13–14, 2,000, BR-04629/2026), CNT/MDA (Oct 13–15, 2,014, BR-00652/2026), Ipespe (Oct 13–15, 1,500, BR-00223/2026), PoderData (Oct 13–15, 3,000, BR-04258/2026), Futura (Oct 14–15, 2,000, BR-03764/2026), Gerp (Oct 14–16, 2,400, BR-05187/2026), Veritá (Oct 12–16, 15,554, BR-01107/2026), Vox Brasil (Oct 15–17, 2,100, BR-04332/2026), DataTrends (Oct 15–17, 2,000, BR-04454/2026), Futura (Oct 16–17, 2,000, BR-06715/2026), AtlasIntel/Bloomberg (Oct 13–18, 4,998, BR-02418/2026), BTG/Nexus (Oct 16–18, 2,002, BR-04499/2026), PoderData (Oct 16–18, 3,000, BR-02586/2026), Real Time Big Data (Oct 15–19, 2,000, BR-02952/2026), Alfa (Oct 15–19, 2,700, BR-00820/2026) and Instituto França (Oct 16–20, 3,000, BR-07896/2026).

The last three have part of their fieldwork after the debate.

About the platforms and this scope

👁 SEARCHES, AUDIENCE, TRANSCRIPTION AND CHAT

Google Trends search interest (<https://trends.google.com.br/trending?geo=BR>), minute by minute, from 4:10 p.m. to 10:03 p.m. on Oct 18, for Lula, Flávio Bolsonaro and debate, and trending searches recorded every two minutes.

Audience from the Kantar Ibope preliminary figures published by JB News (<https://jbnews.com.br/debate-entre-lula-e-flavio-faz-band-superar-globo-e-atingir-maior-audiencia-desde-2022/>) and from the YouTube peak published by Poder360 (<https://www.poder360.com.br/poder-eleicoes-2026/debate-de-lula-e-flavio-na-band-chega-a-539-mil-hoes-simultaneos/>).

Transcript from the broadcast's automatic captions, in 30-second segments, and live chat read from the full replay, without authors, as an indicator of each side's investment and not of the electorate's opinion.

👁 ETHICS AND DATA PROTECTION

Only the text of the posts was submitted to the models, without author, profile or metrics, and the results are published only in aggregate form. Focus group participants signed a consent form, and their statements are presented only in paraphrase.

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SCIENTIFIC COORDINATION OF THE STUDY



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