

From the Factory Floor to the Ballot Box: Firm-Based Origins of Brazil’s Populist Right

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1 Introduction

The global political landscape has witnessed a surge in anti-system politics, marked by the rise of populist leaders who challenge established norms and institutions. Jair Bolsonaro, Brazil’s former president, exemplifies this movement, which has remained resilient even after his electoral defeat by Lula in 2022, as evidenced by the strong performance of his allies in gubernatorial and legislative elections. Bolsonaro’s political ideology and rhetoric align with the anti-system wave that has swept through the United States, Europe, the Philippines, and India.

In recent years, Brazil’s political landscape has significantly shifted with the rise of Bolsonaro and a political movement characterized by anti-system and authoritarian tones and a loose far-right ideology. This movement’s rapid growth is paradoxical in a country that had long been governed by the center-left Workers’ Party (*Partido dos Trabalhadores* - PT), which made significant progress in reducing poverty and inequality.

A conventional explanation for this paradox is that *Bolsonarismo* represents a backlash from the upper classes against the progress made by the poor under the PT. Instead, this article provides empirical evidence supporting the argument that firm-based origins of

wage and job quality inequality in Brazil played an important role in shaping the political sentiments that paved the way for Bolsonaro’s rise.

I argue that firms, as key actors in shaping income inequality, are politically relevant for explaining the political attitudes and electoral choices of their workers. This article demonstrates that the role firms play in shaping inequality can lead to anti-system politics and populist right support.

To explore this hypothesis, I combine individual-level administrative data with observational and experimental evidence from an original online survey. By utilizing these diverse methodologies, I establish a comprehensive understanding of the relationship between job quality, political attitudes, and support for Bolsonaro, highlighting the firm-based origins of anti-system politics in Brazil.

First, using individual-level matched firm-worker data and a two-way fixed effects model, I examine two subsets of workers who are comparable in terms of all observables available in formal employment data recorded in social security records. The analysis focuses on comparable workers who actively expressed support for Bolsonaro and those who did not. This analysis shows a significant association between Bolsonaro supporters and a relative intertemporal decline in their salaries compared to their occupation, industry, and the median wages offered by their employing firms.

Second, I present findings from a large original online survey conducted among full-time workers in Brazil. The survey reveals a strong connection between workers’ negative evaluations of their job quality and employment situation in their firms across various dimensions and their propensity to express anti-system political attitudes. These observational results are supplemented with a conjoint experiment indicating that respondents perceive workers in low-road employment conditions as more likely to manifest anti-system political attitudes and behaviors.

Specifically, this experiment explores the impact of low-road firm-level contractual conditions and affirmative action policies, similar to those implemented by the PT at the national

level. The analysis demonstrates the significance of non-wage components of job quality at the firm level as well as the role of affirmative action policies in shaping anti-system attitudes and behaviors.

Finally, I present an information experiment that evaluates the impact of wage-related information on democratic satisfaction. By providing respondents with disaggregated earnings data by race, indicating that they earn less than their peers, I show that this information negatively affects their satisfaction with democracy when they see they earn less than comparable workers of different races in terms of occupation, skills, industry, and gender.

By integrating these empirical findings, this study expands the literature on the causes of anti-system politics through an in-depth exploration of the relationship between firm-level characteristics, job quality, and political attitudes in a key case. The findings highlight the potential influence of the PT's collective bargaining and wage policies on Bolsonaro's political ascent, underscoring the relevance of both individual-level and systemic factors in shaping Brazil's political landscape. Furthermore, it points to the unintended consequences of government policies that aim to reduce inequality but ignore the underlying heterogeneity in productivity levels and fundamentals between firms in the same industry or product market.

2 Theoretical Framework

Firms are central to the organization of social life, establishing hierarchies and categorical boundaries that construct and reproduce inequalities. As Tilly (1999) argues, workplaces are primary sites where inequalities are both created and maintained. Consequently, changes in production impact relationships of exploitation, opportunities, and claims over resources among different groups.

This article presents a firm-level theory arguing that firms play a crucial role in shaping anti-system political attitudes. While material explanations for changing political preferences

often highlight employment shocks, income changes, and technological advancements, they overlook significant changes within firms. Unlike macro-level economic explanations, this theory focuses on firm-level decisions and strategies. It argues that diverging strategies within firms create a disconnect between workers’ expectations and their economic realities, fostering anti-system sentiments.

Recent decades have seen significant changes in production methods, with workplaces becoming increasingly fragmented (Weil, 2014) and traditional contracts breaking down (Rahman & Thelen, 2018). Despite a focus on skills and worker characteristics, evidence shows significant wage and benefit disparities among similar workers across different firms (Kristal et al., 2020; Song et al., 2019). This indicates that “where you work” is now more critical than ever in determining employment outcomes (Barth et al., 2016).

High-road and low-road firms contribute significantly to income inequality, benefits, job security, mobility, and opportunities across comparable workers (Babecký et al., 2012; Guiso et al., 2005; Kristal et al., 2020; Song et al., 2019). These differences are not rooted in industry fundamentals but in firm-specific strategies and policies. This divergence, termed the “great separation,” reflects a new industrial divide driven by managerial decisions rather than trade, industry, or technology.

The theory suggests that workers in low-road firms experience a disjunction between expectations and employment reality, fueling frustration and anti-system attitudes. Traditional economic explanations for populism focus on macro-level shocks like trade and automation, which often fail to connect individual economic deprivation with populist support. Instead, this theory locates the immediate causes of anti-system politics at the workplace level.

In Brazil, this dynamic is particularly relevant. Before Jair Bolsonaro was elected President, Brazil faced a severe economic crisis characterized by stagnant growth, escalating public debt, and corruption scandals. These conditions contributed to the rise of anti-system sentiments, but the specific appeal of Bolsonaro’s authoritarian rhetoric requires further explanation.

The rise and continuity of Bolsonaro’s radical right populist movement are not yet fully explained in the political science literature. Standard narratives like class conflict do not pass empirical tests, as Bolsonaro’s electorate is highly diverse. Other explanations, like corruption scandals or the role of Evangelicals, are insufficient to explain its broad reach and ideological heterogeneity.

The available evidence indicates a clear disparity in wages between firms in Brazil, irrespective of worker, industry, or product market characteristics. This aligns with the global phenomenon of the “great separation.” Helpman et al. (2017) show that between-firm differences in Brazilian workers’ wages across detailed occupations and sectors increased significantly after trade liberalization in the 1990s, explaining a large portion of total wage inequality.

During the period of economic stability and growth in the early 2000s, income inequality in Brazil declined. Policies such as increasing the minimum wage and expanding social programs helped improve living standards for many. However, recent research shows that firm effects accounted for a significant portion of changes in inequality, driven by pay policies rather than changes in firm fundamentals (Alvarez et al., 2018). While these policies had positive impacts, they did not fully address broader firm-level productivity issues, leaving workers vulnerable to economic fluctuations.

The dynamic labor market in Brazil, characterized by significant informal employment and low geographical mobility, further exacerbates these disparities. Firms with different productivity levels and pay policies contribute to a fragmented labor market where workers’ experiences and outcomes vary widely. This fragmentation can lead to feelings of frustration and disillusionment among workers, fueling anti-system attitudes.

Drawing on previous research, I argue that to understand the paradox where workers with similar observable material characteristics show different political behaviors, we need to focus on workplaces and firm employment strategies, as well as different components of job quality. Following the literature that sees relative economic decline as a precursor to

populist voting, I contend that firm strategies shape workers' subjective perceptions of their well-being, life satisfaction, and frustration with the political system.

In line with the existing literature, I do not develop a new theory regarding relative inequality or workers' expectations. The saturated and often contradictory literature on populism converges on the empirical regularity that relative position and mismatches between labor market outcomes matter for explaining workers' dissatisfaction.

The literature indicates a connection between relative material decline, expectations, and support for populists (Burgoon et al., 2018; Häusermann et al., n.d.; Kurer, 2020). I argue that anti-system attitudes are related to the experiences workers face in their firms, specifically their lived experiences in workplaces and their subjective perceptions of their employment situation relative to their expectations.

3 Context

Before Jair Bolsonaro was elected President of Brazil, the country faced a severe economic crisis characterized by stagnant growth and escalating public debt. Brazil's economy had experienced a period of relative stability during the early 2000s, fueled by rising commodity prices and government initiatives under the Workers' Party. However, the global financial downturn in 2008 exposed vulnerabilities in Brazil's economy, leading to prolonged economic decline. The country struggled with fiscal imbalances, corruption scandals, and a loss of investor confidence. A sharp decline in commodity prices further hindered economic recovery.

This context might have contributed to the election of a candidate who presented himself as an outsider, despite having been a legislator since 1991 and affiliated with various minor parties. However, it remains unclear why his particular brand of anti-system politics with authoritarian rhetoric resonated with a large portion of Brazil's electorate and remains highly popular even after Bolsonaro's failure to get re-elected.

The movement that took Bolsonaro to power in 2019 predates his candidacy by several

years, originating from the early 2015 protests against Dilma Rousseff’s government. At that time, diverse and ideologically heterogeneous groups like the economically liberal Free Brazil Movement (*Movimento Brasil Livre*), the anti-corruption movement Come to Streets (*Vem Pra Rua*), Revolted Online (led by an Evangelical leader), and several pro-military groups coordinated protests despite lacking a unifying agenda or political program other than rejecting mainstream parties on both the left and right (Rocha et al., 2021). Eventually, after various attempts to shape candidacies for different offices, this loose movement laid the groundwork for Bolsonaro’s electoral campaign.

The rise and continuity of this anti-system political movement are not yet fully explained in the political science literature. Standard narratives like class conflict do not pass empirical tests, as Bolsonaro’s electorate is highly diverse. Other explanations, such as corruption scandals or the role of Evangelicals, are insufficient to explain its broad reach, ideological heterogeneity, and temporal persistence. In this article, I address this gap by analyzing how firms shape inequality in Brazil and how this affects workers’ feelings of frustration with the political system and the development of anti-system political attitudes.

3.1 The Puzzle of the Bolsonaro Voter

The existing literature provides limited insights into Bolsonaro’s electoral base (Chaguri & do Amaral, 2023; Hunter & Power, 2019; Rocha et al., 2021). While it is not uncommon for radical right populists to have a diverse and shapeless support base, Bolsonaro’s case amplifies this heterogeneity. This can be attributed to its origins as a grassroots movement lacking clear direction. Similar to populists in Southern European countries, it lacks a distinct core within the working class, distinguishing it from ideologically driven radical right parties in Northern Europe. Furthermore, its rise followed large-scale political scandals that severely undermined traditional parties and left them in a state of crisis.

What sets this case apart is that, contrary to the typical trajectory of a movement evolving into an institutionalized network of local political organizations, eventually transforming

into a more conventional party (as seen with Lega Nord or Ciudadanos), Brazil’s unique and turbulent political climate in 2019 propelled this movement directly to the Planalto, the seat of executive power (Rocha et al., 2021).

Despite rhetoric about class conflict, neoliberalism, and late capitalism prevalent in the qualitative academic literature in Brazil (Richmond, 2020; Søndergaard, 2023), there is no clear evidence that explanations based on an upper-class backlash against the poor have much traction regarding the composition of Bolsonaro’s electoral base.

Demographically, Bolsonaro’s electorate is challenging to characterize in terms of social stratification (Chaguri & do Amaral, 2023). Education, income, being a formal worker, or being an impoverished formal worker are not predictors of Bolsonaro support. Instead, holding authoritarian values (believing that a military coup is a solution to political problems) is a strong predictor of this support (Chaguri & do Amaral, 2023; Rennó, 2020).

In my own original survey of full-time workers in Brazil, race is the only demographic factor that consistently correlates with Bolsonaro’s vote. Although race overlaps with class composition in Brazil, it remains a strong predictor when pooled with other variables. This suggests that the “classist” narrative favored by structuralist or Marxist scholars is not a strong factor in explaining Bolsonaro’s rise.

The evidence indicates that Bolsonaro aligns with the type of radical-right populism analyzed by Akkerman et al. (2014) as an “ideology” in its own right. It resembles populism seen in Southern Europe and the United States, defying strict categorization within a programmatic agenda while incorporating elements that appeal to an ideological and sociocultural right emphasizing race, religion, and conservative values. However, in practice, Bolsonaro’s support base is significantly more diverse than his most politically incorrect expressions on these matters suggest.

An alternative explanation is based on a cultural backlash partly promoted by the strong Evangelical movement. Arguments centered on the role of conservative ideology and Evangelical religion map Bolsonaro to the “culturalist” explanations for the rise of populism

(Hunter & Power, 2019; Inglehart & Norris, 2017). While this connection is strong in the data (do Amaral, 2020), it still fails to explain the diversity and breadth of Bolsonaro’s base.

It is important to note that Evangelicals have long played a strategic role in Brazilian politics, coalescing with governments and parties across the ideological spectrum (Smith, 2019). While the match might seem natural with someone like Bolsonaro, he is not their exclusive ally in national politics. Moreover, some of his positions have been rejected by notable pastors, specifically one of the founders of the movement that led Dilma’s impeachment because they opposed the free market and neoliberal parts of the “new right” agendas (Rocha et al., 2021).

Evangelicals field candidates in almost all districts and are typically part of government alliances. But Bolsonaro’s movement is far more than an issue-based Evangelical party. Its rarity lies in bringing together extremely libertarian and extremely conservative factions of the movement that emerged in opposition to Dilma (Rocha et al., 2021). Just as with other populists with a heterogeneous base like Trump, electorates with conservative values are an important part of their core coalition but do not explain the large electoral shares they obtain.

In terms of programmatic issues, Bolsonaro, like other radical right populists, ran under a loose program mixing identity politics, authoritarianism, and neoliberal or libertarian economic rhetoric. These issues are diverse and sometimes inconsistent. For example, Bolsonaro supporters are more likely to oppose the legalization of abortion but not more likely to oppose gay marriage or support the imprisonment of women who undergo abortion (Rennó, 2020). Among protestors at the March 2015 protests, one of the largest that led to Bolsonaro’s rise, 61% opposed the statement that “gay relationships are not natural” and 50% supported marijuana use (Rocha et al., 2021).

Beyond consensus on some conservative issues, Rennó (2020) and Chaguri and do Amaral (2023) found that a key predictor of voting for Bolsonaro is expressing authoritarian attitudes and sentiments against democracy. Ultimately, behind Bolsonaro is an ideolog-

ically multifaceted, socially heterogeneous electoral base, unified primarily by anti-system sentiment: initially anti-PT, but also rejecting all major parties and questioning democracy.

Given that holding anti-system and authoritarian attitudes strongly predicts Bolsonaro support, we need to explain how these attitudes develop. Data shows these attitudes move independently of cultural or issue-based explanations. While holding conservative values predicts voting for Bolsonaro, cultural-backlash explanations do not sufficiently describe his social base. An alternative political economy explanation focusing on firm-based workers' experiences might provide another path through which anti-system attitudes develop.

This article aims not to adjudicate among potential explanations for a key actor in the worldwide populist wave, but rather to nuance economic explanations of anti-system political attitudes. It highlights subtle dimensions in voters' economic lives that provide a more complete understanding of how they develop anti-system views, reject democratic values, and support populists. Specifically, I argue that firm-based origins of inequality in wages, benefits, job security, and overall job quality significantly influence the political attitudes of workers, independent of their individual characteristics.

3.2 Firms and Inequality in Brazil

Evidence from matched firm-worker data indicates a clear disparity in wages between firms in Brazil, irrespective of worker, industry, or product market characteristics. This aligns with the global phenomenon known as the “great separation,” which describes the division between employees of high-road and low-road companies. In my argument, such high inequality among otherwise comparable workers, due to the differences among the firms that employ them, is highly consequential politically.

Brazil is not exceptional in terms of this “great separation” between high and low-road firms (Alvarez et al., 2018; Godechot, 2018). Helpman et al. (2017) show that between-firm differences in Brazilian workers' wages across detailed occupations and sectors increased by 115% after trade liberalization in the 1990s, explaining 55% of total wage inequality. Recent

trade theories predict that some firms in the same product market benefit from exporting opportunities, while others do not, thus increasing inequality among comparable workers with limited mobility across firms (Dix-Carneiro & Kovak, 2017; Kim & Osgood, 2019). Additionally, low mobility across local labor markets in Brazil increases firms' monopsony power (Dix-Carneiro & Kovak, 2017).

The PT period in government saw a rapid decline in overall inequality in Brazil, particularly during Lula's years (Roberts, 2012; Souza, 2013). However, recent research contradicts some key tenets of conventional wisdom regarding the association between PT governance and lower inequality. Alvarez et al. (2018) find that 40% of changes in inequality are attributable to firm effects. According to the authors, the decline in inequality during the PT period may be due to a compression of returns to firm-level pay premiums. On the workers' side, while educational attainment increased, the decline in high school and college education premiums offset this increase. In other words, more educated workers are earning the same as less educated workers did a decade ago. On the firms' side, growth and trade expansion would have predicted a higher degree of convergence in firm productivity, but instead, productivity levels across firms became more dispersed. Firm-level pay differences explain the initially high levels of earnings inequality, and the decrease in inequality is due to the weakening of the pass-through between firm productivity and earnings.

In other words, inequality decreased without changes in Brazilian firms' fundamentals and was mainly driven by pay policies. According to Alvarez et al. (2018), two key policies explain this: first, the increase in minimum wages and second, the higher centralization of collective bargaining under PT governments.

First, for economically active workers whose real incomes increased during the PT period, the driver was mainly changes in within-firm distribution of earnings, not changes in firm fundamentals. This might have made these workers temporarily better off in absolute terms during periods of growth, but did little to protect them during the recession that began at the end of the PT period. Second, for workers in high-paying firms, the compression achieved

through higher centralization of wage bargaining meant that their incomes were relatively closer to comparable workers in less productive firms. Third, the decline in educational premiums could have created a mismatch between expected and realized incomes for workers in the early stages of their careers.

As Feierherd (2022) has shown, the actual implementation of labor legislation and the local regulatory environment under the PT government was contingent on local politics. Beyond more centralized wage bargaining and increases in minimum wages, there were no significant reforms to reduce the flexibility in determining employment conditions that firms obtained during Cardoso’s government. The PT’s agenda, which focused on wage and income policies rather than addressing labor market segmentation (Feierherd, 2022), made Brazilian workers’ relative situation less resilient to recessions.

To the extent that PT policies had a clear target, such as university quotas, they affected those more likely to be relatively higher at the beginning of their period. Not surprisingly, among all the issues assessed by Rennó (2020) as predictors of Bolsonaro’s vote, one of the strongest effects (comparable to thinking that “elections are not honest”) is the enactment of racial quotas in universities, which has clear labor market consequences.

4 Data & Results

To test the theory, I combine extensive administrative longitudinal data from Brazil’s social security administration (the RAIS dataset) with data on individuals’ support for Bolsonaro’s attempt to create his own party. Additionally, I use an online survey targeting a nationally representative sample of full-time workers, measuring various dimensions of job quality and political attitudes, a conjoint experiment varying firm-level employment characteristics, and an information experiment varying information on wages.

Although testing this argument is challenging due to many unobservable factors influencing both firm selection and political attitudes, the combination of these empirical ap-

proaches—including rich and original data—supports the role that firms play in shaping workers’ political attitudes through their employment strategies. The first design shows that Bolsonaro supporters experienced a relative decline in their real wages in the five years before Bolsonaro’s election compared to very similar workers who did not express support for Bolsonaro’s party.

The online survey indicates that workers dissatisfied with different aspects of job quality are more likely to express anti-system political attitudes. The two experiments in the survey provide additional insights. First, various firm-level characteristics (such as contract stability and ethnic diversity quotas) influence the likelihood of associating workers in those firms with anti-system political attitudes. Second, respondents informed that they earn less than comparable workers of different races are significantly more likely to believe their situation is unfair and that Brazilian democracy is not functioning well.

4.1 Employment Trajectories and Bolsonaro Sponsors

In my first empirical approach, I use individual-level administrative data to evaluate the determinants of expressed support for Bolsonaro among Brazilian workers who are comparable in terms of all observable characteristics in their formal employment records. At the end of 2019, Bolsonaro found himself without a partisan label to compete in the next presidential election after a dispute with the leaders of the Social Liberal Party (PSL), the party he had used as his platform in the previous election. He announced the creation of a new party, Alliance for Brazil (*Aliança pelo Brasil*), and its followers quickly came to be identified as “Aliados.” The key task for Bolsonaro’s movement was to gather enough signatures to allow this new party to compete in the upcoming national elections.

Knowing that their strongest base came from the online movement that preceded his election, Aliados pressured Brazil’s Superior Electoral Court (*Tribunal Superior Eleitoral*) to enact a previous ruling allowing for digital citizen sponsorships. However, delays and disagreements on implementation slowed this process. Consequently, they turned to their

considerable social media reach to organize in-person events in highly transited places (e.g., public beaches) to gather support. At these gatherings, citizens could go to a table where a representative of the movement would register their signature expressing support for the creation of the *Aliança*.

An overview of Aliados’ official communication channels indicates that once again Bolsonaro was driving a heterogeneous grassroots movement. By the end of 2021, however, it was clear that they would not be able to obtain sufficient signatures by the Tribunal’s deadline, despite their efforts. Bolsonaro therefore turned to an alliance with an existing party, the Liberal Party (*Partido Liberal*).

4.1.1 Data

First, the data on supporters of the creation of Bolsonaro’s party was provided under a freedom of information request I presented to the *Tribunal Superior Eleitoral* in 2021. While the Tribunal subsequently restricted access to this data following a change in privacy regulations, Bolsonaro abandoned the idea of creating his own party shortly after this decision and terminated signature collection.

These endorsements are an extremely useful data source, despite the Aliados’ failure to collect a sufficient number within the prescribed deadline. If we consider them an honest expression (or a revealed preference) for a second Bolsonaro term, then they are a valuable indicator of radical right support, even more so than a vote for Bolsonaro, which voters could cast for strategic reasons.

Second, I draw on the Annual Social Information Report (RAIS) for employment characteristics. The RAIS is a detailed matched firm-worker dataset comprising the contractual characteristics, demographic information, occupation, and wages of every formal worker in Brazil, which includes hundreds of millions of longitudinal employment history data points from each worker. This data was accessed through an agreement with Brazil’s Ministry of Labor.

My initial database of sponsors comprised 69,355 individuals. I was able to match 18,117 to the RAIS data using Levenshtein distance matching on full names and by manually validating the results. This approach excluded common names, and of course Aliados supporters outside the formal workers' population (non-economically active citizens, informal workers, and business owners).

4.1.2 Research Design

To understand how Aliados' employment trajectories compare to other similar workers, I exploit the extensive RAIS dataset to obtain a comparable group of workers who are very similar in their observable characteristics but who did not sign support for the creation of *Aliança pelo Brasil*. Specifically, I performed one-to-many matching (each Aliado matched to five equivalent workers) by exact matching on the occupation at the highest level of disaggregation (six-digit occupational codes that follow ILO standards), municipality, educational level, gender, and distance matching on age. This controls for the main observable sources of wage heterogeneity to a very detailed level, as occupations are matched on six-digit codes (e.g., barista, sushi chef, janitor, receptionist, pinewood worker, welder).

To consider a reasonably long and politically relevant period, I compare the employment situation of each group in 2014 and 2019. I chose 2014 because it marks President Dilma Rousseff's successful re-election. This five-year period is important because the country entered a series of economic and political crises that culminated in Dilma's impeachment and President Temer's unpopular government. It is therefore an important period to evaluate whether there are observable differences between the two groups that could be tied to their employment trajectories.

To do this, I use a two-way fixed effects model that allows me to compare the change in relevant observable employment characteristics, while controlling for individually-constant characteristics. My quantity of interest is the change in different measures of compensation and relative employment position in the post-period between the group that expressed

support for Bolsonaro and those in the comparison group that did not.

4.1.3 Results

Simple descriptive statistics (see Figures 1 and 2 and Table 8 in the Appendix) show that despite being equal in key observable characteristics, the trajectory of Bolsonaristas relative to their reference groups (assessed by educational achievement and occupational groups) and in terms of the median wages paid by their firms has been one of relative decline. This decline, however, is not seen among workers who did not express support for Bolsonaro.

This result is tested in the two-way fixed effects design in Table 1. In this model, the coefficient on the interaction between being an Aliado and the time period in which citizens could express their support for Bolsonaro’s party identifies the change in wages among Aliados relative to neutral workers, after controlling for individually fixed characteristics and across two groups that (thanks to the initial matching procedure) are already very similar.

Interestingly, if we look at the absolute values, the profile of workers that support Bolsonaro seems to be better compensated than others in their same occupational groups. Yet they also seem to experience a rapid decline that is not seen among the non-Bolsonaristas.

Being a Bolsonaro supporter is associated with the average yearly wage of a worker having declined by 102 *reais*, and the educational and occupational “premia” above the reference groups being 95 and 161 *reais* respectively. To understand the magnitude of these differences, consider that the decline in occupational premium represents almost 15% of the average premium in 2014.

While it is not possible to attribute this decline to wage-compression policies induced by PT’s policies, they do indicate that diminishing wage premia and inequality within occupational groups seem to correlate with a higher likelihood of developing anti-system political attitudes among those experiencing the relative decline. In this period, many factors were affecting the Brazilian economy, from a large-scale recession, fiscal tightening, and labor reforms, to be able to attribute these changes to any particular policy. What is interesting,

though, is that declining inequality across very similar groups of workers might be spawning anti-system reactions. This aligns with the notion introduced in the theory that firm-based sources of inequality, rather than large differences across the overall income distribution, might be politically consequential.

Table 1: OLS - Robust standard errors.

| | <i>Dependent variable:</i> | | |
|--------------------|----------------------------|-----------------------|------------------------|
| | Av. monthly wage (th. rs.) | Wage diff. occupation | Wage diff. educ. group |
| Aliados * t = 2019 | -0.102** (0.041) | -0.095** (0.045) | -0.161*** (0.041) |
| Individual effects | Yes | Yes | Yes |
| Year effects | Yes | Yes | Yes |
| Observations | 90,855 | 90,846 | 90,855 |

Note:

*p<0.1; **p<0.05; ***p<0.01

4.2 Experimental Evidence from an Online Survey

While the results above provide suggestive evidence for my hypothesis, they may indicate the presence of a very specific phenomenon among the most politically mobilized and frustrated workers. Additionally, though the approach combining matching and worker-fixed effects minimizes heterogeneity, it does not solve the key endogeneity problem when trying to make causal inferences about politics based on firm-worker data. Specifically, time-varying unobservable characteristics of workers affect both their selection into jobs or firms and their political attitudes. For example, depressed or sick workers might underperform at work, and their frustration or anger might also make them more likely to support Bolsonaro, without a causal relationship between job characteristics and political choice.

In other words, the design above faces two problems: first, generalizability or “external” validity, as it is based on a very specific population subset; second, while illustrative of an interesting pattern, it falls short of being able to causally identify the effect of changing

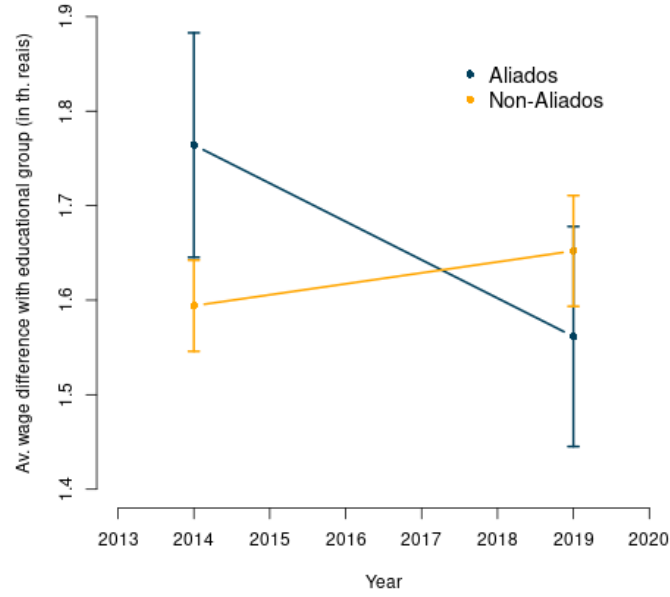


Figure 1: 5-year change in average wage difference with respect to the individual's educational group. 95% CIs.

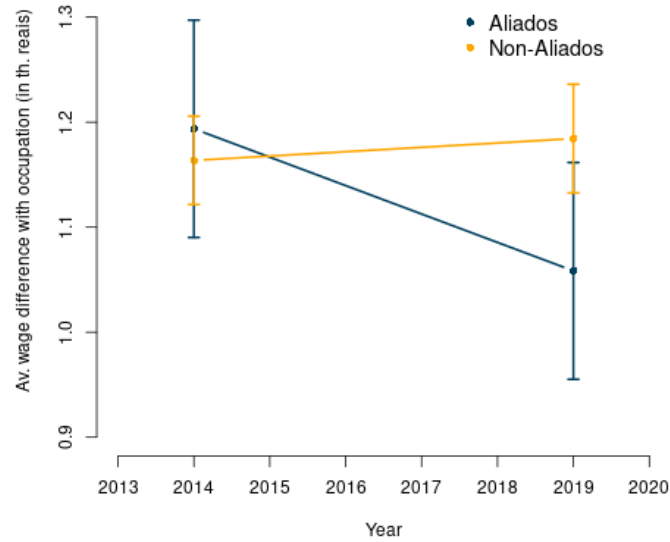


Figure 2: 5-year change in average wage difference with respect to the individual's six-digit occupational group. 95% CIs.

employment characteristics on anti-system political attitudes.

To address these concerns, I implemented an online survey targeted exclusively to full-time workers (n=1,373). The survey included both a battery of job quality questions and two survey experiments. Together, these pieces provide strong evidence that there is a relationship between firm-level working characteristics and the development of anti-system political attitudes. The design replicates an instrument that I had already fielded in Italy, with the questionnaire adapted in translation for cultural and context adequacy.¹ The survey was fielded online using quota sampling, with nationally representative quotas for gender and age. In the following sections, I present my observational results before doing the same for each embedded experiment.

| Dimension | Item |
|------------------------------------------|--------------------------------------------------------------------------------------|
| Pay & Benefits | The compensation that I receive for my work is fair |
| | My compensation (including benefits) is adequate based on what is paid on the market |
| | My compensation adequately matches my performance |
| Opportunities & Training | I am satisfied with the training I received in this company |
| | I have good opportunities for learning and developing in this company |
| | In general, I think I can achieve my career objectives in this company |
| | I have good career opportunities in this company |
| Engagement & Fairness | I have the opportunity of being involved in decisions that affect me |
| | This job gives me a sense of self-realization |
| | This company values my contributions |
| | This company gives equal opportunities to all its employees |
| | I would recommend this company to others as a great place to work |
| Job security | My position is stable and I don't think there is a risk of being laid off |
| | This is a succesful company |
| | This is a company in decline |
| Working times / Work-life balance | Working times are adequate and allow for a good work-life balance |
| Physical environment | I am satisfied by the physical environment of work |

Table 2: Battery of employment-related questions.

¹Pre-registration: <https://osf.io/68vj7>

| Dimension | Item |
|------------------------------|-------------------------------------------------------------------------------------|
| Anti-system attitudes | Democracy works well in this country |
| | This country's system of government is the best possible one |
| | Fundamental rights of citizens are well protected by the political system |
| | I and my friends are well represented by the political system |
| | I have respect for the political institutions of this country |
| | Participating in elections guarantees that my interests are well-represented |
| Anti-system behaviors | Take part in protests and blockades |
| | Take part in a group that wants to overthrow the government |
| | Vote for parties that oppose the current political system |
| | Refuse to pay taxes |
| | Participate in protests against immigration |
| | Participate in social media groups that oppose the political system |
| Populist beliefs | Difference between citizens and the elite are larger than among citizens |
| | I would prefer to be represented by a common citizen than a professional politician |
| | Elected candidates talk much and achieve little |

Table 3: Battery of political attitudes.

4.2.1 Observational Results

First, I implemented a reduced battery of employment questions based on the European Working Conditions Survey and a standard battery of anti-system political attitudes (Muller et al., 1982). This section aims to answer whether job quality, measured through detailed items and disaggregated into its different dimensions, has a relationship with holding anti-system political attitudes, independently of the most obvious predictors that relate both political attitudes and why some workers are employed in certain firms (such as educational levels or industry).

The components in the employment battery measure different aspects of job quality, which the literature assumes will be lower in low-road firms. These included: compensation and benefits, relationships and experiences of autonomy and fairness within the firm, job security, work-life balance, and availability of training opportunities in their workplace. Each dimension was reduced and scaled in the same direction. The political anti-systemness of each respondent was reduced using the same procedure. All measures are standardized for

ease of interpretation.

The results show an inverse relationship between job quality and anti-system attitudes across all dimensions of job quality. More interestingly, even when pooling all the (highly collinear) dimensions together, my measures of autonomy, engagement, and fairness in how workers perceive they are treated by their firm have an even larger effect on anti-systemness than compensation and benefits. Additionally, the measure of work-life balance also has a large effect in this more saturated model.

In other words, even after accounting for detailed industry, firm, and worker characteristics among a representative sample of full-time Brazilian workers, those who perceive poorer job quality are considerably more likely to manifest higher levels of anti-system political attitudes.

Table 4: OLS estimates of std. PC of political items on PC of employment items

| | <i>Dependent variable:</i> | | |
|---------------------------------|------------------------------|--------------------|--------------------|
| | Anti-System Attitudes (PC 1) | | |
| | (1) | (2) | (3) |
| Compensation & Benefits | −0.31*** (0.03) | | |
| Autonomy, Engagement, Fairness | | −0.34*** (0.03) | |
| Job security | | | −0.26*** (0.03) |
| Constant | −0.30 (0.44) | −0.17 (0.44) | −0.36 (0.44) |
| Industry & Firm Controls | Yes | Yes | Yes |
| Worker Controls | Yes | Yes | Yes |
| Observations | 1,364 | 1,364 | 1,364 |
| Residual Std. Error (df = 1327) | 0.94 | 0.93 | 0.95 |
| <i>Note:</i> | *p<0.1; **p<0.05; ***p<0.01 | | |

Table 5: OLS estimates of std. PC of political items on PC of employment items

| | <i>Dependent variable:</i> | | |
|---------------------------------|------------------------------|--------------------|--------------------|
| | Anti-System Attitudes (PC 1) | | |
| | (1) | (2) | (3) |
| Training opportunities | −0.32*** (0.03) | | |
| Working times | | −0.26*** (0.03) | |
| Physical environment | | | −0.23*** (0.03) |
| Constant | −0.31 (0.45) | −0.12 (0.43) | −0.22 (0.44) |
| Industry & Firm Controls | Yes | Yes | Yes |
| Worker Controls | Yes | Yes | Yes |
| Observations | 1,364 | 1,364 | 1,364 |
| Residual Std. Error (df = 1327) | 0.94 | 0.95 | 0.96 |
| <i>Note:</i> | *p<0.1; **p<0.05; ***p<0.01 | | |

Table 6: OLS estimates of std. PC of political items on PC of employment items

| | <i>Dependent variable:</i> |
|--------------------------------|------------------------------|
| | Anti-System Attitudes (PC 1) |
| Compensation & Benefits | −0.12*** (0.04) |
| Autonomy, Engagement, Fairness | −0.16*** (0.06) |
| Job security | −0.04 (0.03) |
| Training opportunities | −0.05 (0.05) |
| Working times | −0.07** (0.03) |
| Physical environment | 0.04 (0.03) |
| Constant | −0.24 (0.44) |
| Industry & Firm Controls | Yes |
| Worker Controls | Yes |
| Observations | 1,364 |
| Residual Std. Error | 0.93 (df = 1322) |
| <i>Note:</i> | *p<0.1; **p<0.05; ***p<0.01 |

4.2.2 Information Experiment

The first experiment provided respondents with information regarding the salaries of hypothetical workers who were similar to them in observable characteristics and employed in a firm representative of their industry. The treatment group saw salaries that were between 8% and 16% higher than their reported salary, with the percentage difference varying across race groups, following a realistic distribution of wages in the RAIS data. In this way, respondents were informed of two things at the same time: that they earned less than others in their occupational group and how much less they earned compared to similar workers of other races.²

In line with the theory and with the results from Section 4, the expectation is that a worker who observes that their salary is lower than their peers will react with frustration, feelings of unfairness, and eventually develop anti-system political attitudes. The outcomes are measured in a large battery of anti-system attitudes, with perceptions of democracy (being the most salient item in the PCA analysis) positioned right after the treatment uptake questions. The outcomes are measured on five-point scales.

The results in columns 1 and 2 in Table 7 show that the treatment uptake was significant, and that respondents exposed to information showing their salaries were low were less likely to think the salary they were paid for their work was fair. More importantly, we see a similarly sized and significant effect on perceptions of democracy, with workers exposed to the information treatment being 0.13 points (on a 5-point scale) less likely to think that democracy works well in Brazil.

4.2.3 Conjoint Experiment

In the conjoint experiment, respondents were presented with two tasks in which they saw the characteristics of the firms where two hypothetical workers, who were similar to the

²Power considerations led me to prefer this bundled treatment, though further research should explore the relative contributions of the wage information and the wage-race information treatments.

Table 7: ATE of receiving relatively lower salary information among comparable workers

| | <i>Dependent variable:</i> | | | |
|--------------------------|----------------------------|--------------------|-----------------------------|------------------|
| | Salary for my work is fair | | Democracy works well | |
| | (1) | (2) | (3) | (4) |
| Treatment: Lower salary | -0.18*** (0.06) | -0.17*** (0.06) | -0.13** (0.07) | -0.13* (0.07) |
| Industry & Firm Controls | No | Yes | No | Yes |
| Worker Controls | No | Yes | No | Yes |
| Observations | 1,373 | 1,373 | 1,371 | 1,371 |
| Residual Std. Error | 1.14 (df = 1371) | 1.10 (df = 1333) | 1.24 (df = 1369) | 1.22 (df = 1331) |
| <i>Note:</i> | | | *p<0.1; **p<0.05; ***p<0.01 | |

respondent in educational level, gender, and net salary, were employed. They were then asked which of the two workers they thought said a phrase manifesting a political attitude or engaged in a certain behavior. The characteristics of the firms (the vertical axis in Figures 3 and 4) varied firm ownership, CEO compensation relative to workers, contract length, benefits, the use of diversity quotas for promotions, working schedules, and informality.

The results show that respondents think comparable workers are considerably more likely to think that there is no real democracy when they are hired informally (AMCE = 0.11), when working times are not flexible (AMCE = 0.11), and when they lack benefits (AMCE = 0.9). In general, low-road characteristics move in the expected direction, though the strongest effects on anti-system attitudes and behaviors are on informality, benefits, working times, and diversity quotas.

Interestingly, using diversity quotas as a criterion for promotions (a policy strongly associated with PT's agenda) has large effects on thinking that they are treated unfairly, that differences between the elite and the people are larger than differences among the people (a key component of populist ideology in Akkerman et al.'s 2014 battery), as well as taking part in protests and being part of groups that want to overthrow the government.

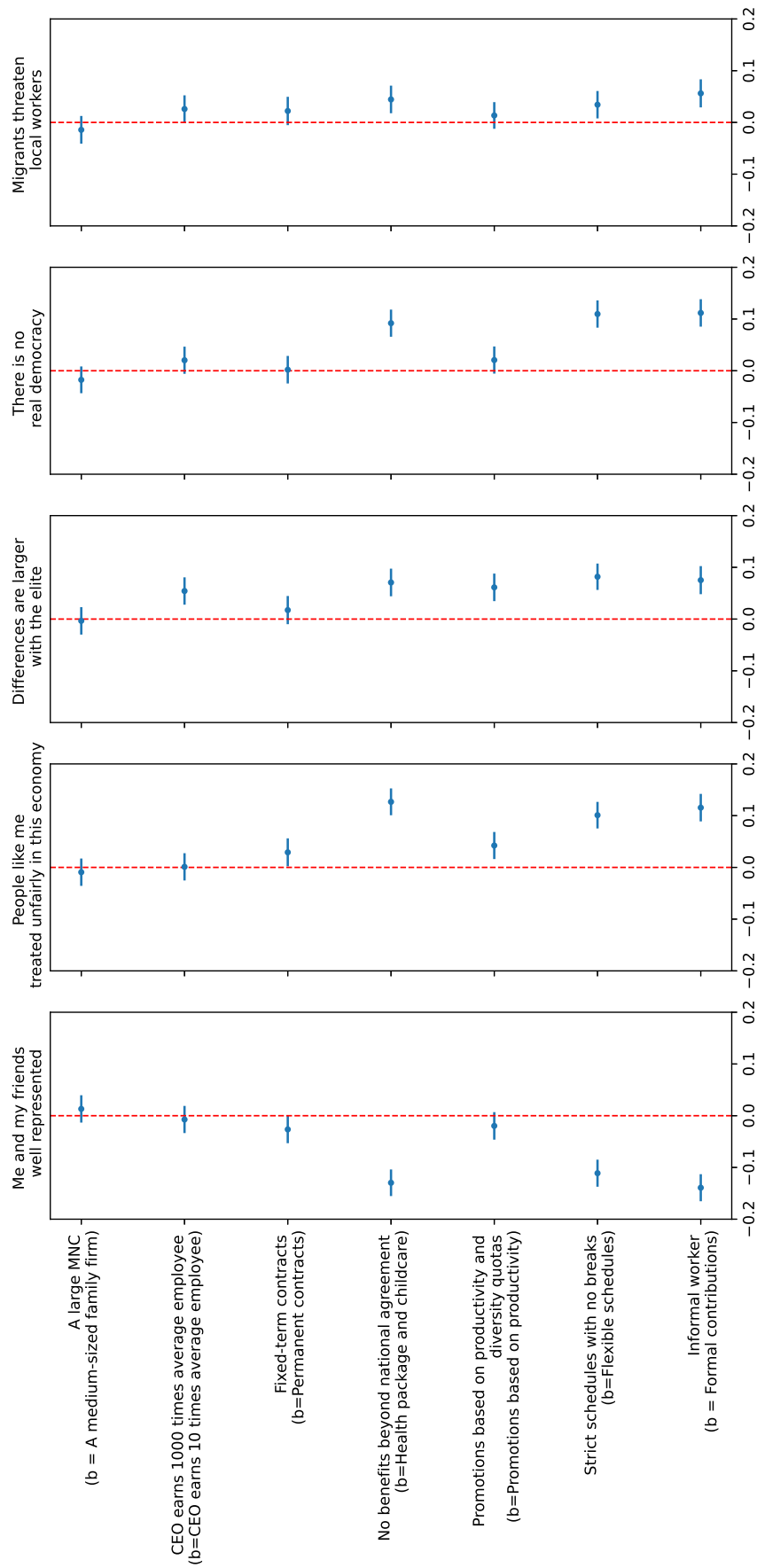


Figure 3: Average Marginal Component Effects on attitudinal items. 95% CIs.

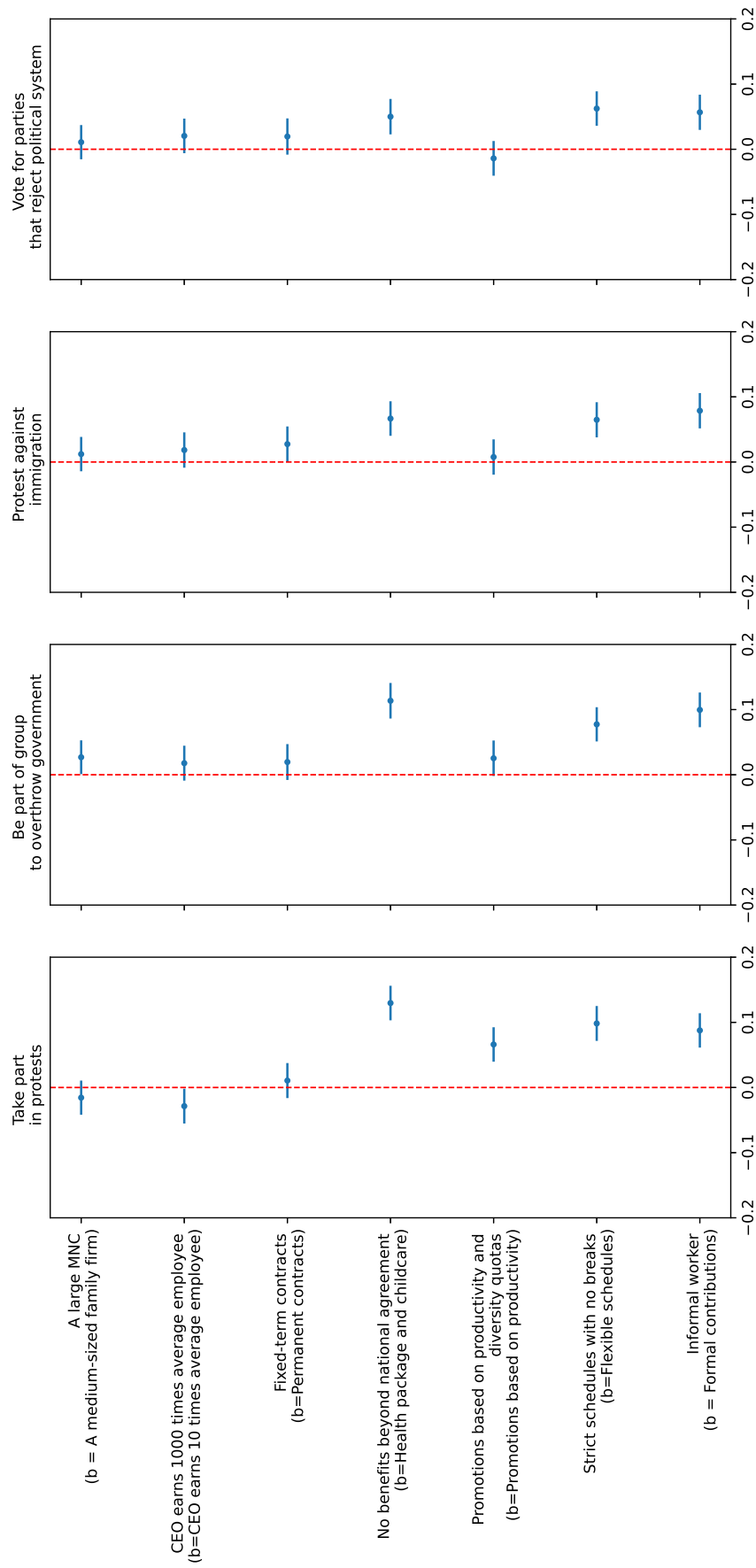


Figure 4: Average Marginal Component Effects on behavioral items. 95% CIs.

5 Conclusion

This article challenges the prevailing narratives that attribute Bolsonaro’s electoral base to class conflict or an upper-class backlash against the poor. Instead, it argues that anti-systemness, along with authoritarian attitudes, is a defining feature of Bolsonaro’s supporters. I posit that the development of these attitudes is related to workers’ firm-based experiences, both in terms of their relative wages and the differentials in several components of job quality. The relative decline in workers’ well-being and job quality due to firm-based strategies contributes to their anti-system views and frustration with the political system. Importantly, declining income inequality in the general population (as measured through the Gini index) might not counteract and could even reinforce this effect.

To evaluate this argument, the study examined the employment trajectories and characteristics of Bolsonaro supporters in Brazil during the period in which he attempted to create his own political party. The data, obtained from supporters’ signatures collected for the party’s creation, provided a unique opportunity to analyze the employment experiences of this group and to compare them to a similar group of non-supporters. The findings indicate that Bolsonaro supporters experienced a relative decline in their employment situation, wages, and occupational premiums compared to non-supporters. The decline in occupational premiums, in particular, indicates a significant change that may have contributed to their anti-system political attitudes.

The article also presented evidence from an online survey that showed that anti-systemness declines with increases in job quality across several dimensions. This suggests that workers’ perceptions of how they are treated within the firm and their overall work experiences play a significant role in shaping their anti-system political attitudes. Furthermore, the study conducted an information experiment in which respondents were provided with information about the salaries of comparable workers in their industry. Those told their salaries were lower than their peers were more likely to perceive their own salary as unfair and to have less confidence in the functioning of democracy in Brazil. Finally, a conjoint experiment varying

firm-level characteristics provided more insight into the mechanisms, experimentally finding that firm-level employment conditions are associated by respondents with political attitudes and behaviors.

Together, these results provide valuable insights into the relationship between employment trajectories and the development of anti-system political attitudes in Brazil. Understanding the development of anti-system attitudes among workers is crucial in unraveling the puzzle of Bolsonaro's support. Firm employment strategies and components of job quality, rather than observable material characteristics, shape workers' subjective perceptions and their dissatisfaction with the political system. The article argues for the need to examine the intricate dynamics within workplaces to gain a more comprehensive understanding of how anti-system views are formed.

This article contributes to the growing literature on the political consequences of economic inequality by highlighting the importance of firm-level dynamics in shaping individuals' political views. Moreover, it demonstrates the potential consequences of firm-based sources of inequality and relative decline within occupational groups for democratic politics. While the specific causes of the decline cannot be attributed to any particular policy, the findings suggest that diminishing wage premiums and increasing inequality within similar groups of workers may contribute to the development of anti-system views. Addressing issues related to compensation, autonomy, fairness, and work-life balance in the workplace may therefore contribute to reducing anti-systemness among workers.

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Appendix

Data Access Procedures

Accessing the RAIS Dataset

The RAIS dataset, which contains detailed social security records of formal sector employees in Brazil, can only be accessed by researchers who obtain approval from Brazil’s Ministry of Labor. To apply, researchers must submit an institutional application through their university, following the detailed instructions provided on the Ministry’s official website: <https://www.gov.br/pt-br/servicos/solicitar-acesso-aos-dados-identificados-rais-e-caged>.

The approval process does not have a fixed duration; according to the Ministry’s website, the processing time is not estimated (“Tempo de duração da etapa Não estimado ainda”). Researchers should account for potential variability in processing times. There are no direct costs involved in obtaining the data. However, researchers should plan for storage costs, as the dataset is large and computationally intensive.

In this study, the data was accessed via an institutional agreement between MIT and Brazil’s Ministry of Labor, which adhered to these protocols.

Accessing the Apoios Dataset

The dataset on apoios (individuals expressing support for the creation of a political party) was accessed through Brazil’s Tribunal Superior Eleitoral (TSE). Researchers must create a user account on the TSE’s *ouvidoria* platform and file a request for data access using the following link: <http://www.tse.jus.br/eleitor/servicos/ouvidoria/formulario-da-assessoria-de-informacao-ao-c>

For this study, communications with the TSE were managed via their official email: protocolo@tse.jus.br. The response time for this process can vary, but in this case, approval was received approximately one month after the request was submitted.

There are no costs associated with accessing the apoios data.

Reproducibility Considerations

Due to data privacy restrictions, the RAIS and apoios datasets cannot be publicly shared. However, all code and aggregated data used in the analysis are available upon request. Researchers with the necessary permissions from the relevant Brazilian authorities can use these resources to replicate the study's findings.

Survey Results

Table 8: OLS - Robust standard errors.

| | <i>Dependent variable:</i> | | | | |
|--------------------|----------------------------|----------------------|----------------------|----------------------|----------------------|
| | Wage | Occup. dif. | Educ. dif. | Firm-Industry | Firm median |
| Aliados | 0.120* (0.070) | 0.030 (0.056) | 0.170*** (0.065) | 0.055** (0.023) | 0.110*** (0.029) |
| t = 2019 | -0.050** (0.024) | 0.021 (0.022) | 0.058** (0.023) | 0.121*** (0.011) | 0.185*** (0.013) |
| Aliados * t = 2019 | -0.252*** (0.047) | -0.156*** (0.046) | -0.260*** (0.046) | -0.090*** (0.023) | -0.156*** (0.026) |
| Constant | 3.872*** (0.026) | 1.164*** (0.021) | 1.594*** (0.024) | 0.401*** (0.008) | 2.499*** (0.010) |
| Observations | 90,855 | 90,846 | 90,855 | 77,384 | 77,384 |

Note:

*p<0.1; **p<0.05; ***p<0.01

Table 9: LPM estimates of std. PC of attitudinal items on Bolsonaro vote

| | <i>Dependent variable:</i> | |
|---------------------------------|-----------------------------|-------------------|
| | Voted for Bolsonaro in 2022 | |
| | (1) | (2) |
| Anti-System Attitudes (PC 1) | 0.16*** (0.01) | |
| Anti-System Behaviors (PC 1) | | 0.10*** (0.01) |
| Constant | 0.39*** (0.13) | 0.40*** (0.13) |
| Industry & Firm Controls | Yes | Yes |
| Worker Controls | Yes | Yes |
| Observations | 1,364 | 1,364 |
| Residual Std. Error (df = 1326) | 0.46 | 0.47 |
| <i>Note:</i> | *p<0.1; **p<0.05; ***p<0.01 | |

Table 10: LPM estimates of std. PC of attitudinal items on Lula vote

| | <i>Dependent variable:</i> | |
|---------------------------------|-----------------------------|--------------------|
| | Voted for Lula in 2022 | |
| | (1) | (2) |
| Anti-System Attitudes (PC 1) | -0.20*** (0.01) | |
| Anti-System Behaviors (PC 1) | | -0.07*** (0.01) |
| Constant | 0.54*** (0.12) | 0.54*** (0.13) |
| Industry & Firm Controls | Yes | Yes |
| Worker Controls | Yes | Yes |
| Observations | 1,364 | 1,364 |
| Residual Std. Error (df = 1326) | 0.45 | 0.48 |
| <i>Note:</i> | *p<0.1; **p<0.05; ***p<0.01 | |