*Forthcoming* in Kirk Hawkins, Ryan Carlin, Levente Littvay, and Cristóbal Rovira Kaltwasser (eds.), The Ideational Approach to Populism: Concept, Theory, and Analysis, Routledge

# CHAPTER 4

## Expert Surveys

Nina Wiesehomeier

Recent discussions on the conceptualization appear to coalesce around definitions of populism as a set of ideas and a discourse, facilitating empirical measurement and thus such comparative studies. This consolidation has led to advancements in quantitative research applying various techniques of text analysis to measuring populism in selected countries (e.g. Hawkins 2009; March (this volume); Rooduijn and Pauwels 2011). Uncovering degrees of populism by being more attentive to nuances among political actors, be they political parties or leaders, and moving beyond the commonly used populist/non-populist dichotomy prevalent in more qualitative research, these studies have greatly improved our understanding of this political phenomenon.[1] However, we are left with important limitations.

By concentrating only on measuring the degree of populism in isolation from other ideological features, such techniques have so far not advanced our understanding of populism in terms of, for instance, programmatic appeal, nor have they advanced our larger comparative understanding as large scale cross-national approaches to the measurement of this political phenomenon are mostly lacking.[2] Furthermore, depending on the region in question, textual analysis may be hampered by problems of data availability (see for instance Hawkins and Rovira Kaltwasser forthcoming). In addition, studies using text analysis necessarily have to rely on

[1] For a discussion of "degreeism" and the conceptualization of populism see Aslanidis (2016, 92-93).

[2] One major exception is Hawkins and Castanho e Silva (this volume).

different textual sources across different units of analysis that may have been devised for different audiences serving a very different purpose. In other words, the data generating process of party manifestos vs. speeches by party leaders are likely to be quite dissimilar, which means that comparisons between leaders and parties based on this data may be difficult, although such comparisons may be very pertinent, particularly in presidential systems. And finally, a more directed comparison of the most common definitions used in such approaches and their capacity of capturing populism is still missing.

To help to overcome such limitations, this chapter uses expert surveys to measure populism in the context of Latin American presidential systems. In political science, expert surveys are most commonly used as a method to estimate empirical policy spaces and the positions of political actors within those spaces. The best-known examples have applied expert surveys to estimate party positions on a dimension of left-right political ideology (Castles and Mair 1984; Huber and Inglehart 1995), party locations on numerous policy dimensions and their importance to parties (e.g. Laver and Hunt 1992; Benoit and Laver 2006; Wiesehomeier and Benoit 2009), and party positioning on European integration (Marks and Steenbergen 2004; Rohrscheider and Whitefield 2007). Moreover, expert surveys provide us not only with the means of simultaneously measuring the degree of populism of political actors as well as their location on various positional issues; they also allow us to simultaneously measure, and thus compare, placements of political actors such as presidents *and* political parties on the same metric (Wiesehomeier and Benoit 2009).

The use of expert surveys, the results of which are typically aggregated into a mean or consensus opinion, along with assessments of uncertainty associated with these estimates, is especially useful to provide information on complex phenomena (for more details on expert

surveys as a research instrument see Benoit and Laver 2006; Benoit and Wiesehomeier 2009). Expert surveys are an explicit *a priori* approach to measuring political phenomena of interest, and as such they give the researcher complete flexibility of perceiving the phenomena in question, in our case populism, either as a package of attributes from different domains, or rather as being composed of features that are potentially separable into different dimensions.[3]

As the following discussion will show, the characteristics of expert surveys may be particularly advantageous for navigating the complexities of a phenomenon such as populism. Seeking to clarify overlaps and differences among the most prominent definitions of populism as a set of ideas, an informal style, or as a strategy, this chapter reports results of two waves fielded in 2011/2012 and 2015 in Argentina, Brazil, Bolivia, and Chile that used different approaches to measuring the degree of populism of up to 47 political parties and four presidents. While the earlier study exploits the overlap of these definitions and conceives of populism as a bundle of attributes combined in a single metric, the second study disaggregates these attributes, leaving it to empirical tests to explore how they, and thus the different conceptualizations of populism, relate to each other. Contrasting both approaches, the discussion underlines that having disaggregated dimensions not only allows for a more fine-grained approach to studying political actors, but already points towards important differences among definitions.

Using the disaggregated measures of the second wave of the expert survey only, the chapter subsequently proceeds to examine if and how 10 separately measured policy dimensions and the general left-right scale are associated with the degree of populism. This analysis is

[3] This a priori nature also detaches the researcher from any posterior interpretation of the dimensions, an interpretation that is not unambiguous as it risks being influenced by the researcher's own interests and perspectives.

performed on a more comprehensive sample of 165 political parties and 18 presidents in 18 Latin American countries. The results indicate that across Latin America, populism is not related to social policy (interpreted as policies on matters such as abortion, gay rights, and euthanasia) or minority rights. Rather, populist actors are distinguished by their views on economic redistribution, a preference for tough measures to fight crime, and a rejection of a closer relationship with the United States. Although all in all, the results indicate a left-wing variant of populism across Latin America (see also Levitsky and Roberts 2011; Mudde and Rovira Kaltwasser 2011; 2013), they strongly suggest shortcomings of understanding populism as a narrow discursive approach or as informality in relating to people, as both of these measures are only able to capture specific subtypes of populism.

**Operationalizing Populism**

The underlying assumption of expert surveys is that the key substantive issues on which judgments are sought can be identified in advance. Respondents, in our case experts with a high degree of specialized knowledge about party politics in their own national contexts, are then presented with these predefined questions or scales and asked to use their best judgments in placing given actors on this metric we describe. Hence, using expert surveys successfully requires that each scale we ask experts to assess is given a clear title and is anchored at each end with two precise substantive definitions of the scale endpoints based on a theoretical understanding of the issue we are interested in.

In recent years conceptual discussions have centered on populism as a political strategy (i.e. the political-institutional approach), as an informal style, or as a set of ideas (i.e. the ideational approach or discourse). While populist discourse is the underlying logic that unites these different conceptualizations (see Hawkins and Rovira Kaltwasser this volume, but also

Hawkins and Riding 2009), there are some important, albeit at times subtle differences. Weyland (2001), for instance, defines populism as a *political strategy* used by leaders to appeal to a heterogeneous electorate, emphasizing a personalistic relationship (see also Levitsky and Roberts 2011; Taggart 1995; 2000). Although specifying populism as a strategy does not ignore the content of the populist appeal, populism in this sense is linked to a particular form of political mobilization and therefore to a particular form of political organization with a focus on the rather unmediated relationship between a personalistic leader and his followers.

Populism as a *set of ideas* on the other hand, emphasizes the antagonistic, Manichaean nature of populism, "a discourse which sees politics as divided in moral terms" (Hawkins and Silva 2015, 3). Politics is presented as a conflict between the two opposing poles of "the people" vs. "the elite." Understood as a discourse, populism is consequently a mode of political expression that allows "[redefining] the people and their adversaries" (Panizza 2005, 8, see also Laclau 2005) and for which therefore the central form of identification of the struggle over power comes in the form of antagonism, in the form of anti-establishment, anti-elite and anti-status-quo rhetoric. Although related to the purely discursive approach, the ideational definition (Hawkins and Rovira Kaltwasser in this volume; Mudde 2004; Mudde and Rovira Kaltwasser 2011; 2013), stresses that this binary morality is the essential part of the populist tenet. Populist ideas represent "the people" as a homogenous, uniform majority with an identifiably unified will that should be the basis of all governing and "the elite" as a corrupt ruling class, as the exploitative minority that has hijacked the political process. Yet, while "populist ideas are the main driving force" (Hawkins and Rovira Kaltwasser forthcoming, 7), the precise implications of these ideas for how populist actors understand the wider democratic system and the decision-making process is seen as context dependent and open to empirical investigation.

In partial contrast to both of these, conceptualizations of populism as an *informal style* give greater priority to the status markers or identities of the elite and people, and less attention to the antagonism between them and the idea of democratic betrayal that animates this. However, like the other definitions, it sees the elements of populism as orthogonal to the general left-right dimension (Kaltwasser 2013). For example, Ostiguy (2009) treats populism in spatial terms as a separate quantifiable dimension of political competition with clearly defined opposites of a "high" and "low" identity. This identity dimension in turn consists of two sub-dimensions: socio-cultural and political-cultural, which both relate to "ways of *being* and *acting* in politics" (Ostiguy 2009, 5, emphasis in the original). On the social-cultural sub-dimension, politicians at the high end tend to be well-mannered, with a rational and ethically oriented discourse, while at the low end politicians tend to use slang and demonstrate overall a more unmediated demeanor. The political-cultural sub-dimension refers to modes of leadership, with more formal and institutionally mediated procedures on the high end of the scale, and personalistic authority on the low end. Overall then, the high-low axis contrasts more abstract political appeals emphasizing properness in manners and procedures on the "high" with appeals on the "low" that have a quality of immediacy for both decision-making and relating to the people.[4]

Understanding populism as a continuum is helpful as it allows us to move away from simple categorizations of parties and leaders as being either populist or not, depending on whether they espouse a necessary combination of populist characteristics. However, although the advances in empirical measurement discussed above provide us with a sliding scale of populism, the degrees uncovered in these studies are merely indicating a "more or less" of populism. This is unsatisfactory as it remains unclear what the absence of populism means. Locating political

[4] For a similar performative approach, see Moffitt (2014) and Moffitt and Tormey (2014).

actors on a scale to capture degrees of populism thus raises the question of how to define its opposing pole. Defining this opposite may improve our understanding of what parties and leaders actually do.[5]

Mudde and Rovira Kaltwasser (2013) argue that populism in fact has two opposites in elitism and pluralism (see also Hawkins 2009; Plattner 2010). While elitism effectively reverses the morality attached to "the people" and "the elite," thereby maintaining a dualistic outlook on social order, pluralism acknowledges the inherent diversity in society. Thus, pluralist actors consider the different groups that constitute the social fabric of a country as legitimate, and favor the diffusion of power, emphasizing deliberation and consensus to overcome any emerging conflicts. Mudde and Rovira Kaltwasser (2013, 153) highlight that in the context of political competition most parties adhere to the pluralist worldview as part and parcel of liberal democracy. Thus, to anchor the endpoints of the predefined scale on which experts were asked to locate given actors, populism was treated as a continuum with two opposing endpoints of populism vs. pluralism. This is akin to Ostiguy's (2009) definition of his scale endpoint of "high," which appears to be rooted in a pluralistic understanding of political appeals.

*A Bundled Approach*

[5] It would be equally unsatisfactory to simply measure the degree of leftism of political actors instead of either locating them on a continuous axis of left – right or providing a measure for their degree of rightism at the same time. However, nothing prevents researchers using text analysis from measuring a separate scale of for instance pluralism and to then combine these measures into one metric, similar to the Comparative Manifesto's approach to measuring left-right party placements.

The considerable overlap among conceptualizations of populism highlighted above forms the point of departure for the first approach to measuring populism. The first wave of expert surveys aimed at capturing the complexity of populism as a *bundle of attributes* combined in a single metric with two well-defined endpoints.[6] In such an operationalization political appeals are thus understood as taking place on a single scale, on a continuum of populist to pluralist appeals, and experts were consequently asked to locate political parties and presidents in Argentina, Brazil, Bolivia, and Chile on this single dimension entitled "political communication."[7] The substantive definitions of the scale endpoints asked country experts to locate political parties and presidents along a 20-point scale, where 1 indicated the populist end defined as:[8]

- "Highlights the interest of the people, with reference to the sovereign will of the majority. Condemns the ruling class and interest groups. Emphasizes personal authority, capable of leadership and a decisive resolution of problems. Uses an informal style and slang." (1)

[6] This is the approach taken by the Chapel Hill expert survey (CHES) project on party positioning on European integration for their "GAL/TAN" dimension (Hooghe et al. 2002). Respondents are asked to locate political parties on a scale with the endpoints Green/Alternative/Libertarian combining attitudes to democratic participation, libertarianism (e.g. attitudes to abortion, homosexuality), and ecology and the opposing pole of Traditional/Authoritarian/Nationalism, combining traditional values, defense, opposition to immigration.

[7] As it is a loaded term, the use of the word "populism" was avoided in the survey.

[8] I would like to thank Cristóbal Rovira Kaltwasser, Kirk Hawkins, and Pierre Ostiguy for feedback and fruitful discussions when devising these definitions.

and 20 indicated the pluralist endpoint as:

- "Highlights the interests of citizens, with references to civic or republican values. Recognizes the ruling class and interest groups as legitimate. Emphasizes impersonal authority, the formality of procedures and separation of powers. Uses a “well-educated” style and more formal language." (20)

The wordings of the opposing poles thus combine different elements present in the conceptualizations discussed above and contrast them with their corresponding opposites of pluralism. Reference to the people is fundamental to all approaches, although the antagonistic nature of the discourse is of less importance to the informal style. The emphasis on leadership is pertinent to populism understood as a strategy and the "low" end of the political-cultural dimension, while the last element refers to the socio-cultural dimension in the style approach.

*A Disaggregated Approach*

By design, this bundle only provides the possibility of measuring positions on these elements together. It may be argued that this masks important differences among the definitions, but also among actors to be located on such a scale: it may be possible for a political actor to score high for populism on one of those attributes, e.g. engaging in the use of informal language, but to exhibit pluralist tendencies on others. Measuring these elements on separate dimensions, therefore, allows exploring potential variability and how the dimensions, and thus different conceptualizations, relate to each other. Consequently, the second expert survey disaggregated the bundle into separate dimensions with concise and straightforward wordings of the endpoints.

The goal of focusing more closely on the areas of overlap among the different definitions meant parting with the most distinguishing feature of populism as a strategy and the political-cultural element of the "low." Excluding this feature also opens the possibility of exploring

empirically the relation between populism and organizational characteristics (see also Mudde and Kaltwasser 2012). At the same time the aim was to strengthen differences among conceptualizations. As a result, the wording of the remaining elements was revised in several rounds of discussions and feedback obtained from selected focus groups.[9] Regarding the ideational approach, for instance, the wording needed to avoid ambiguities while making sure that it captured the essence of the two opposing camps of "the pure people" and the "corrupt elite." As both function as empty signifiers (Laclau 1977; see also Mudde and Rovira Kaltwasser 2012; 2013), for the sake of parsimony and in order to avoid compromising scale comparability across countries, the wording was kept general so that experts could then interpret the endpoints as befitted their own country's context.

Expressions such as "the will of the majority" or "the unified will of the common people" triggered confusion and were not interpreted by focus group participants in an unequivocal way as signaling populism. Rather it was argued that in political competition politicians would in general defend acting in the name of "the will of the people" and that the distinction would emerge from how this group would be conceived of. In its final version, therefore, the wording aimed at capturing the degree to which the pure people, the heartland of the nation (Taggart 2000), are emphasized opposite to a pluralist understanding of society.

[9] I would like to thank Cristóbal Rovira Kaltwasser, Kirk Hawkins and the participants of focus groups with students and staff at Brigham Young University and Swansea University in February/March 2015 for discussions and feedback.

People-centrism:[10]

- Identifies with the common people and celebrates their authenticity (1)
- Refers more generally to citizens and their unique interests (20)

In a similar vein, the expression "treating opponents as legitimate" appeared difficult to match to non-populist conduct, and a reference to a "corrupt elite" proved equally ambiguous regarding both the question of who constitutes the elite and what would be considered as corrupt. Hence, the element aiming at measuring the degree of anti-elitism in moral terms vis-à-vis the acceptance of the political elite as the legitimate representatives of divergent and dissenting opinions in society was adapted accordingly.

Anti-elite: morality

- Demonizes and vilifies opponents. (1)
- Treats opponents with respect. (20)

As an embodiment of the purely discursive approach, the Chapel Hill expert survey (CHES) item was used that measures populism as the saliency of antagonism in terms of anti-status-quo-rhetoric (Polk et al. 2017).[11] Thus, respondents were asked to judge whether for a political actor "anti-establishment and anti-elite rhetoric" was:

Anti-elite: rhetoric

- Not important at all (1)

[10] The titles given to the different attributes in this section were not used in the survey itself. To avoid bias, the title indicated to respondents that the survey was eliciting judgments on political communication of political parties and presidents.

[11] I would like to thank Gary Marks and Ryan Bakker from the CHES for early access to this question wording and allowing its usage in my survey.

- Extremely important (20)

Finally, the socio-cultural dimension of the high-low axis in politics was maintained as capturing informality in style.

Informal style:

- Uses an informal style and popular language (1)
- Uses a "well-educated" style and more formal language (20)

In addition, country experts were asked to judge positions of political actors on up to 14 distinct policy dimensions and the general left-right ideological axis. Results of some of these items are analyzed later in the chapter, once the results of the different approaches to measuring populism are discussed, and help us analyze the question of what particular issue dimensions are attached to populism across Latin America.

**Building versus Disaggregating**

The operationalization of populism as a single bundled dimension was deployed in 2011/2012 in Argentina and Bolivia, two countries in which populism could be expected to be salient in political competition, and in Brazil and Chile, two countries in which it was not. The disaggregated approach, on the other hand, was implemented in a survey fielded in 2015 in all 18 Latin American countries. For a contrast of these different approaches to measuring populism, in total we can thus compare experts' placements of 3 presidents and 34 political parties across both surveys.[12] It has to be pointed out that the response rate in 2015 was lower than in 2011/2012. In the latter instance, the survey yielded about 91 valid responses across all four countries, a figure that dropped to 62 in 2015.

[12] In the case of Chile the presidents changed between two waves, from Sebastián Piñera to Michelle Bachelet, and so these had to be omitted.

As both waves also asked respondents to locate parties and presidents on the general left-right dimension, in a first step we can compare these sets of measures that are trying to capture the exact same underlying quantity across the two surveys as a way of cross-validating our results. Figure 4.1 plots the association between the experts' mean left-right placements of parties and presidents in the first and the second waves along with a linear fit and 95% confidence interval and shows that with an r=0.97 the left-right scores between the two waves match up almost perfectly.

<FIGURE 4.1 HERE>

Similar to political actors' left-right placements, our measures of populism across the two waves try to capture the same underlying quantity, albeit of course using different approaches – whereas in the first wave we place political actors on one single metric, in the second wave the elements combined should capture the degree of populism of political parties and presidents. Table 4.1 provides evidence that the latter is indeed the case. As the second column indicates, the results from the principal component analysis including the four different dimensions measured at the respondent level show that a single factor emerges, explaining 54% of the variance on an underlying common dimension.[13] We can thus proceed and create an additive populism index created from the four individual dimensions of people-centrism, anti-elite sentiments (as morality and as importance of rhetoric) and the informality of style of the second wave, and compare the results to the scores on the bundle obtained from the first wave.

<TABLE 4.1 HERE>

[13] Yet, the varimax rotated factor loadings indicate that populism as informal style shows by far the weakest loading.

Figure 4.2 contrasts these experts' mean placement of parties and presidents, again providing a linear fit and 95% confidence interval. Although with a correlation of 0.81 the agreement between the two different measures is still quite high, the figure hints at the problematic nature of the bundled measure.[14] The strongest connection among placements for political actors on the single metric of the first wave and the populism index based on the disaggregated dimensions from the second wave can be found for the two countries in which populism is a salient feature of political competition, namely, Argentina and Bolivia. The association is mainly driven by both the respective presidents and the presidential parties which can be found in the southwest corner of the figure.

<FIGURE 4.2 HERE>

In other words, in political systems in which populism is an important part of political competition, the "usual suspects" who score high on populism as a bundle of attributes also score high for populism on each of the disaggregated dimensions. For instance, former Argentine president Christina Kirchner receives a mean placement of 4.63 on the populism item in 2011/2012 and 4.60 on the populism index in 2015, while her party *PJ-Frente para la Victoria* both times receives a score of 4.54. The same can be said for the "obvious" pluralist contenders, such as the Argentine *Partido Socialista* with a mean placement of 14.87 in the first and of 14.28 in the second wave; we find only a few moderate cases in these countries. In Brazil and Chile the picture is reversed and we almost exclusively find moderate political actors on the aggregate measure from the first wave. Given that populism is less salient in competition in these countries, overall this appears to make sense. Yet, witness the dispersion of Brazilian and Chilean political

[14] Excluding informal style from the index drops the result for the coefficient of the pop-index to 0.62, with an r-squared of 0.56.

actors along the horizontal cross-lines indicating the mid-point of the populism measure as a bundle. Put differently, these results suggest that in political systems in which populism is less salient, using a bundle of attributes may not allow experts to be more nuanced; most actors end up as being scored as moderately populist.

<FIGURE 4.3 HERE>

To shed further light on this, Figure 4.3 contrasts experts' mean placement of parties and presidents on the single metric of the first wave with each of the individual attributes of the second wave, providing a linear fit and 95% confidence interval.[15] All four panes highlight a remarkable variance on the individual dimensions, leading to even more dispersion around the mid-point of the bundled measure, a variation that becomes more glaring when excluding the Argentine and Bolivian presidents and presidential parties typically located in the south-west corner. This is particularly pertinent in the lower-left hand pane, contrasting populism as a bundle with the saliency of anti-establishment rhetoric, but is also pronounced in the upper left-hand pane contrasting people-centrism with the single populism metric. The sub-dimensions may thus play an important role in political competition in countries such as Brazil and Chile which is however masked by forcing experts to judge political actors on a single metric combining different attributes. It appears that experts average out variation we may find on individual dimensions, leading to a loss of valuable information on individual actors and party systems.[16]

[15] For ease of interpretation, the anti-establishment and anti-elite dimension has been flipped so that 1 indicates now the populist endpoint.

[16] The construction of the index obviously also results in attenuation. Yet, given that the individual measures allow for more variance, this effect is less pronounced. Note that the

Ultimately, however, we cannot know for certain whether experts confronted with the task of classifying parties and presidents on a bundled measure indeed consider all of the attributes in conjunction or whether some particular element stands out in their minds. This is important, as from a conceptual point of view only the combination of the individual components of the ideational approach would render an actor populist. Given these complications, it is preferable to mirror potential conceptual complexities of populism in its measurement approach and to exploit the availability of disaggregated components. Disaggregation, for instance, offers the possibility of probing into the question of how the individual attribute relate to each other, which, given current discussions on conceptualization and measurement, is a desirable property. Figures 4.4 and 4.5 contrast experts' mean placements of parties and presidents on the individual dimensions of people-centrism, anti-elitism as morality and rhetoric, and populism understood as informal style. Although the disaggregated measures in this second wave have been deployed in all 18 Latin American countries, for the ease of visual inspection these contrasts are only displayed for the four countries in the focus of this section.[17]

<FIGURE 4.4. HERE>

<FIGURE 4.5 HERE>

The first thing to notice is that the individual dimensions allow for much more variation of actors' placements across both, the countries in which populist appeals are salient and those in

---

uncertainty of the placement scores on the single metric are not larger vis-à-vis individual dimensions.

[17]As these results are taken from the 2015 expert survey wave only, the number of cases increases and the results show the locations of four presidents and 47 parties.

which it is not a central part of political competition. The disaggregated information also reveals how the individual elements relate to each. As the south-west pane of Figure 4.4 shows, with an r=0.89, the closest fit can be found between the two dimensions aiming at measuring the ideational definition of populism as people-centrism and the moral treatment of the elite as vilifying the political opponent.

In contrast, as the left-hand pane of Figure 4.5 shows, the connection between people-centrism and the CHES measure of anti-elitism is less pronounced and we observe off-quadrant cases across all party systems. For instance, *Peronismo Federal* and *Frente Renovador* in Argentina and the *Partido Republicano da Ordem Social*, the *Partido Trabalhista Brasileiro* and the *Partido Democrático Trabalhista* in Brazil espouse people-centrism, but without necessarily expressing anti-elite rhetoric. The *Frente de Izquierda y de los Trabajadores* in Argentina and the *Partido Humanista* in Chile, on the other hand, do appeal to the citizenry as a diverse body, but do so with an emphasis on anti-elite rhetoric. Similarly, the south-east pane of Figure 4.4 indicates that *Peronismo Federal* and *Frente Renovador* from Argentina, the *Partido Democrático Trabalhista* and to a lesser extent the party *Solidariedade* from Brazil, and the *Movimiento Sin Miedo* from Bolivia all discredit and vilify their opponents, but without stressing antagonistic rhetoric.

Thus, contrary to combining several attributes into a bundled dimension, disaggregated measures allow for a more fine-grained differentiation among types of political actors. We may find political parties emphasizing people-centrism without pushing anti-elite sentiments, while we also can find clear cases of anti-elite parties which refrain from populist appeals to a homogeneous group of "the people," but rather appeal to a broader citizenry, an assessment facilitated by clearly defining the opposing pole of populism. In addition we can gain a better

understanding of if and how actors differ from each other. Such a contrast may be of particular interest in presidential systems as presidents and their own parties may be subject to different incentives when it comes to political competition (see for instance Arnold, Doyle, and Wiesehomeier forthcoming; Wiesehomeier and Benoit 2009).

A look at the scores of former Argentine president Christina Kirchner and her party's on the disaggregated measures, for instance, highlight interesting differences. While on their level of anti-elitism both actors are quite similar (anti-elite rhetoric 4.95 vs. 5.10 for her party; vilifying the opponent 4.43 vs. 4.33 for her party), the ex-president is judged to be slightly more informal (2.96 vs. 3.87 for her party), but to appeal much less to a homogenous people (6.04 vs. 4.87 for her party). As presidents have to appeal to the entire nation, such moderation highlights the different constraints under which presidents and their parties operate. Since expert surveys allow us to measure presidents and their parties on the same metric, they offer us the possibility to examine such differences.

Overall the results highlight that people-centrism and the moral treatment of the elite are– in line with the conceptualization of the ideational approach–closely related, a relationship that, as the figures show, is least influenced by the presence of actors deemed highly populist such as the Argentine and Bolivian presidents and presidential parties. Simple anti-elite rhetoric, on the other hand, seems to be far less connected to painting the opponent in moral terms, a feature that lies at heart of any definition of populism, or to the emphasis on "the people." Informality shows an even weaker relationship with both people-centrism and anti-elite stances, using either two measures of the latter. In other words, respecting the opponent and championing the citizens can be accomplished in a quite colloquial way, as is the case of for instance the *Partido Demócrata*

*Cristiano* in Bolivia, but it is certainly possible to espouse anti-elite sentiments in a well-mannered form, as can be observed with the *Partido Verde* in Bolivia.

Thus, disaggregated measures do not only shed a much needed light onto conceptual discussions, but also open up the possibility to explore those differences in empirical research further. One of these questions that the results in this section give rise to is whether the variation observed on individual attributes also relates to different policy content. The following section probes into this question, expanding the sample to all 18 countries and thus a total of 165 political parties and 18 presidents.

**Populism and Policy Appeals in Latin America**

When moving to the full sample of 18 countries, the patterns highlighted in the previous section are confirmed (see Wiesehomeier 2017). Just as with the reduced sample, the data indicate a substantial overlap among the different conceptualizations of populism and a particular close fit between the two dimensions aiming at measuring the ideational approach. But it also shows a significant amount of dispersion, marking potentially different types of political actors across Latin America. As the expert survey also asked respondents to judge the placements of parties and presidents in their countries on a number of policy issues independently from the populism items, we can explore the question of whether we can identify a common type of populism across the region in terms of policy appeals across irrespective of the conceptualization used.

Table 4.2 shows the results of a series of linear regressions of positioning on people-centrism, anti-elitism as morality, a combined index for the ideational approach, anti-elite rhetoric, and populism as informal style, pooling the countries and using as explanatory variables

positioning on ten issue dimensions.[18] These issues include the three dimensions concerning economic policy, social policy, and environmental policy that form part of Benoit and Laver's (2006, chapter 4) "hard core" and the dimensions of regional economic cooperation (understood as a preference for the trading bloc ALBA, the Bolivarian Alliance for the Peoples of Our America (*Alianza Bolivariana para los Pueblos de Nuestra América*)), privatization, and religious principles in politics. Positioning on these policy dimensions has been found to describe policy competition across Latin America well, forming an underlying left-right dimension (see Wiesehomeier and Benoit 2009). Furthermore, policy dimensions that have been deemed to be related to populism in Latin America, such as anti-Americanism, and to be related to its rather inclusive nature compared to a more exclusionary variant of populism in Europe (Rovira Kaltwasser and Mudde 2013), such as redistribution and minority rights, are included. Because the survey in addition asked experts to place parties and presidents on the general left-right dimension, "taking all aspects of party policy into account," Table 4.2 also shows the results for linear regressions of populism and its subcomponents on positioning on the left-right ideological axis.

How do policy appeals compare across the individual attributes? In other words, can we observe differences or can we rather identify common issues across the individual dimensions rooted in different conceptualizations? As Table 4.2 indicates, comparing the results across people-centrism, anti-elitism as morality and rhetoric, and populism as informal style, reveals interesting areas of common ground, but also highlights important differences.

As the first column of Table 4.2 indicates, people-centrism, the first attribute of the ideational approach, is strongly connected to rejecting closer ties to the United States, the only

[18] For the exact wording of these dimensions see Appendix.

substantive issue that is in fact related to all four attributes. A one unit change on the scale ranging from 1 (rejecting closer ties) to 20 (favoring closer ties) amounts to a change of 0.33 on the people-centrism dimension. In addition people-centrism is connected to the trade-off between the respect for individual liberties and security. Political actors at the populist end of this scale support tough measures to fight delinquency, violence and organized crime which fits the strong-men image some Latin American populists espouse. While the appeal to a homogeneous people is also weakly related to a preference for religious principles, redistribution just misses the 10 percent significance level.

<TABLE 4.2 HERE>

Positioning on anti-elitism in its moral version (column 3), the second attribute of the ideational approach, is also connected to anti-Americanism, albeit to a lesser extent. It is more strongly related to pertinent domestic issues such as a preference for lowering taxes, favoring religious principles in politics, supporting tough measures to fight crime, and most importantly to a preference of redistribution of wealth from the rich to the poor. A one unit change on the scale ranging from 1 (strongly favors redistribution) to 20 (strongly opposes redistribution) amounts to a change of 0.38 on the anti-elite (morality) dimension. The combination of the dimensions of people-centrism and anti-elite morality into a single populism index based on the ideational approach (column 5) confirms that populism across the region is linked to a weak preference for religious principles in politics, the support of crime fighting measures, a strong rejection of close ties with the United States and a clear preference for redistribution.

Anti-elitism understood as the importance of antagonistic rhetoric (column 7), on the other hand, captures mostly anti-neoliberal and anti-American stances. A one unit change on the

dimension of the relationship to the United States amounts to a shift of almost half a unit (0.43) on the anti-elite rhetoric scale ranging from 1 (important) to 20 (not important at all). Anti-elite rhetoric is equally strongly connected to a preference for the trading bloc ALBA – indeed, anti-establishment rhetoric is the only dimension related to regional cooperation embodied by this left-wing alliance.

These substantive differences point to important differences in measurement. The item measuring anti-elite sentiment in moral terms avoided the use of the word "elite," instead referring to an opponent, while the CHES measure aiming at capturing populism via one single item based on the discursive approach incorporated it. It appears that at least in the case of Latin America, in experts' minds anti-elite rhetoric is predominantly associated with international actors, while anti-elite sentiment in terms of vilifying an opponent appears to be linked to internal actors. In this sense the relationship between the preference for redistribution of wealth and anti-elite rhetoric as measured by the CHES item is also much weaker.

Aggressive rhetoric in the form of criticism of neoliberal politics, verbal confrontations with the United States, and a rejection of the Free Trade Area of the Americas (FTAA) is of course best epitomized by prototypical left populist presidents such as Néstor and Cristina Kirchner in Argentina, the late Hugo Chávez in Venezuela, who established ALBA as an alternative to the FTAA, and Evo Morales in Bolivia, who due to his background as coca peasant unionist entered politics with a clearly developed anti-neoliberal and anti-American stance. The CHES item then captures a substantive part of populism in the region; however, it only captures a very specific subtype. With its emphasis on the antagonistic nature of populism, the CHES item misses an important part of the conceptualization of populism as a set of ideas, while the term "elite" may simply carry strong ideological connotations.

This is confirmed by the measures' strong relationship to positioning on the general left-right ideological axis, as highlighted in column 6 of Table 4.2. A one unit change on the left-right scale ranging from 1 (left) to 20 (right) amounts to a 0.71 change on the CHES item of antagonistic rhetoric ranging from 1 (important) to 20 (not important at all). As columns (2), (4) and (6) show, both dimensions aiming at measuring the ideational approach and their combination also reveal a left variant of populism in Latin America. Yet, their relationship with the general left-right ideological axis is much weaker compared to the saliency of anti-establishment rhetoric, with people-centrism showing the weakest relationship. In other words while people-centrism and anti-elitism in its moral form capture a left tendency, they also detect pertinent domestic issues that go beyond a simplistic left-right distinction. The dimensions rooted in the idealistic approach therefore provide us with an insight into policy issues without confounding populism with ideology as is the case with a narrow discursive approach focusing on antagonism.[19]

Using the immediacy in demeanor and relating to people as a proxy for populism (column 9), also raises questions. Informal style shows its strongest connection to the rejection of closer ties with the United States, suggesting a clear left tendency. It is, however, also strongly

[19] Testing for a curvilinear relationship between the different conceptualizations of populism and ideology to detect extreme right and extreme left populists confirms the patterns detected here. Anti-elite rhetoric shows a strong left bias and a quasi linear relationship (for a similar problematic pattern in the European case see Polk et al. 2017), while the relationship between the items measuring the ideational approach rather uncovers a left tendency. Informality, on the other hand, confirms its presence on both, the left and the right. These results are available upon request.

connected to right tendencies in the form of a preference for economic growth even at the cost of damage to the environment, a relationship that none of the other populism items seems to capture. In addition it relates to the promotion of cutting public services to cut taxes and shows its weakest link to the preference for tough measures against delinquency. Given this policy mix it is not surprising that the last column of Table 4.2 indicates that this dimension is clearly orthogonal to left-right, as envisioned by Ostiguy (2009). Yet, as the factor analysis has shown, whether informality can be understood as a distinguishing element of populism seems less clear. Combined with the striking lack of a connection to redistribution, a policy issue that consistently has been linked to contemporary populism across the region, informal style may thus rather capture a performative element of politics that may very well be shared by populist and pluralist actors rather than identifying populism across the region.

**Conclusion**

The challenges of measuring populism are, of course, manifold, and the resulting quantities have important implications on our capacity to answer outstanding questions. Contrasting two different approaches to measuring populism, this chapter has not only highlighted the advantages of expert surveys as a tool, but has also shed light on potential problems of one approach over another. Although it may be tempting to have only one single item in a survey to capture populism – after all we want to ease the burden on respondents by avoiding unnecessary long surveys – the discussion has shown that a bundled solution has important drawbacks. Disaggregating populism into different attributes, on the other hand, allows us to uncover interesting variation along the individual dimensions which facilitates a more fine-grained assessment of political actors and systems. This is of particular interest for presidential systems where institutional incentives may play out differently for presidents and

parties, actors that can be measured on the same metric using expert surveys, and thus compared. A disaggregated approach, however, may also help to highlight differences among populist actors in parliamentary systems that currently may be muted.

More importantly, however, this chapter has also shed light on pertinent conceptual issues by exploring these individual dimensions rooted in different conceptualizations of populism and their relationship to policy appeals. What we want – and need – is a "jack of all trades device," a measure that is firmly rooted in a sound conceptualization, able to capture the diversity and complexity inherent to populism's capacity of attaching itself to different ideologies (aka policy appeals), while at the same time able to provide a comparative perspective indicating a broader tendency (aka the ideological left-right).

The analysis suggests that definitions of populism in terms of a narrow discursive approach focusing on anti-elite rhetoric, and a definition based on identity focusing on the informality in demeanor and relating to people, may only capture parts of populism. Even though these may be substantive parts, they rather tap into a very reductionist understanding of populism. Isolated features, as important elements as they may be, do not constitute full manifestations of populism, and consequently these measures seem to be missing important domestic appeals populist in the region have in common. The stark relationship of both, anti-elite rhetoric and informal style, with a rejection of closer ties with the United States in addition begs the question whether anti-elite rhetoric also captures a performative element. While I explore the implications of this in more detail elsewhere (Wiesehomeier 2017), the results in this chapter underline that relying on a single item such as anti-elite rhetoric may be misleading for a more comprehensive understanding of populism.

At least for the Latin American region, an operationalization of populism as a set of ideas in the form of the ideational approach that takes into consideration its components of people-centrism and anti-elitism in its moral version, as well as their combination into an overall index, captures populism best. Not only do these measures highlight the fluidity of and shifts across political systems, but they also mirror the essence of populism – that the programmatic content of populist appeals may change depending on context. While anti-Americanism is the clearest left contender, it is increasingly difficult to extrapolate clear left-right ideological positions on the policy dimension of redistribution across all Latin American countries. In some instances right-leaning candidates successfully contested elections promising to keep redistributive policies previously introduced by left governments (see Montero 2010; Wiesehomeier and Doyle 2013). Similarly, promises to fight crime have been made on the left and on the right.[20] Religion may be a predominantly conservative domain, yet we find a considerable number of leftist actors with preferences for religious principles in politics across the region (see Wiesehomeier 2010). And although lowering taxes can carry effects of poverty reduction by providing incentives for people to leave the informal sector (see Tumen 2016), as a trade-off with public service reduction it is an economic policy mostly related to the right. Thus, combining measures operationalizing full instances of populism grounded in the ideational approach may be our "jack of all trades," highlighting diversity in appeals, pinpointing to policy issues exploited by populist actors, and providing us with a broad tendency across countries without confounding populism with ideology.

[20] Interestingly, recent discussions of public security on the left and the right ideological spectrum are increasingly linked to immigration. The 2017 Chilean presidential campaign is a prominent example.

References

Arnold, Christian, David Doyle, and Nina Wiesehomeier. "Presidents, Policy Compromise, and Legislative Success." Forthcoming in *The Journal of Politics*.

Aslanidis, Paris 2016. "Is Populism an Ideology? A Refutation and a New Perspective." *Political Studies* 64: 88-104.

Benoit, Kenneth, and Michael Laver. 2006. *Party Policy in Modern Democracies*. London: Routledge.

Castles, Francis and Peter Mair. 1984. "Left–Right Political Scales: Some 'Expert' Judgments." *European Journal of Political Research* 12(1): 73-88.

Hawkins, Kirk 2009. "Is Chávez Populist? Measuring Populist Discourse in Comparative Perspective." *Comparative Political Studies* 42(8): 1040-1067.

Hawkins, Kirk and Bruno Castanho e Silva. 2016. "Mapping populist parties in Europe and the Americas." Paper presented at "Explaining Populism: Team Populism January Conference," Provo-UT, January 28-30.

Hawkins, Kirk and Scott Riding. 2009. "Populism in Latin America: The AmericasBarometer 2008." Paper presented at the Annual Meeting of the Midwest Political Science Association, Chicago, April 1-5.

Hawkins, Kirk and Cristóbal Rovira Kaltwasser. "The ideational approach to populism." Forthcoming in *Latin American Research Review.*

Huber, John, and Ronald Inglehart. 1995. "Expert Interpretations of Party Space and Party Locations in 42 Societies." *Party Politics* 1(1): 73–112.

Hooghe, Lisbeet, Gary Marks and Carole Wilson. 2002. "Does Left/Right Structure Party Positions on European Integration?" *Comparative Political Studies* 35(8): 965-989.

Laclau, Ernesto. 1997. *Politics and Ideology in Marxist Theory: Capitalism, Facism, Populism.* London: New Left Books.

Laclau, Ernesto. 2005. *On Populist Reason*. London: Verso Books.

Laver, Michael, and W. Ben Hunt. 1992. *Policy and Party Competition*. New York: Routledge.

Levitsky, Steven and Kenneth Roberts 2011. *The Resurgence of the Latin American Left*. Baltimore: The Johns Hopkins University Press.

March, Luke (this volume). "Populist ideology in the UK party system: measurement and practice."

Marks, Gary/Steenbergen, Marco. 2004: Marks/Steenbergen Party Dataset. Available from http://www.unc.edu/~gwmarks/data.htm.

Moffitt, Benjamin. 2014. "How to Perform Crisis: A Model for Understanding the Key Role of Crisis in Contemporary Populism. " *Government and Opposition* 50(2): 189-217.

Moffitt, Benjamin and Simon Tormey. 2014. "Rethinking Populism: Politics, mediatisation and Political Style." *Political Studies* 62(2): 381-397.

Montero, Alfred. 2010. "Their Separate Ways: Leftist Mobilization and Clientelist Continuity in Brazilian Subnational Politics." Paper presented at the workshop on *Political Consequences of Declining Inequality in Brazil*, Oxford University, December 3.

Mudde, Cas. 2004. "The Populist Zeitgeist." *Government and Opposition* 39(4): 542-563.

Mudde, Cas and Cristóbal Rovira Kaltwasser. 2011. "Voices of the Peoples: Populism in Europe and Latin America Compared." *Kellogg Institute Working Paper No. 378.*

Mudde, Cas and Cristóbal Rovira Kaltwasser. 2013. "Exclusionary vs. Inclusionary Populism: Comparing Contemporary Europe and Latin America." *Government and Opposition* 48(2): 147-173.

Ostiguy, Pierre. 2009. "The High and the Low in Politics: A Two-Dimensional Political Space for Comparative Analysis and Electoral Studies." *Kellogg Institute Working Paper No. 360.*

Panizza, Francisco. 2005. *Populism and the Mirror of Democracy*. London: Verso Books.

Plattner, Marc F. 2010. "Populism, Pluralism, and Liberal Democracy." *Journal of Democracy* 21(1): 81-92.

Polk, Jonathan, Jan Rovny, Ryan Bakker, Erica Edwards, Liesbet Hooghe, Seth Jolly, Jelle Koedam, Filip Kostelka, Gary Marks, Gijs Schumacher, Marco Steenbergen, Milada Vachudova and Marko Zilovic. 2017. "Explaining the salience of anti-elitism and reducing political corruption for political parties in Europe with the 2014 Chapel Hill Expert Survey data." *Research & Politics* 4(1): 1-9.

Rooduijn, Matthijs and Teun Pauwels. 2011. "Measuring Populism: Comparing Two Methods of Content Analysis." *West European Politics* 34(6):1272-1283.

Rohrschneider, Robert/Whitefield, Stephen. 2007. "Representation in New Democracies: Party Stances on European Integration in Post-Communist Eastern Europe." *Journal of Politics* 69(4): 1133–1146.

Rovira-Kaltwasser, Cristóbal. 2012. "The ambivalence of populism: threat and corrective for democracy." *Democratization* 19(2): 184-208.

Taggart, Paul. 1995. "*New populist parties in Western Europe.*" *West European Politics* 18(1): 34-51.

Taggart, Paul. 2000. *Populism*. Buckingham: Open University Press.

Weyland, Kurt. 2001. "Clarifying a Contested Concept: Populism in the Study of Latin American Politics." *Comparative Politics* 34(1): 1-22.

Tumen, Semih. 2016. "Entrepeneurship in the shadows." *Economics of Transition*: n/a-n/a.

Wiesehomeier, Nina and Kenneth Benoit. 2009. "Presidents, Parties and Policy Competition." *Journal of Politics* 71(4): 1435–1447

Wiesehomeier, Nina. 2010. "The meaning of left-right in Latin America. A comparative view." *Kellogg Working Paper 370.*

Wiesehomeier, Nina. 2017. "Populism vs. Anti-elite rhetoric. A comparison based on expert survey results." Paper presented at the XIII Congreso de AECPA, Santiago de Compostela, September 22nd

Wiesehomeier, Nina and David Doyle. 2013. "Discontent and the Left Turn in Latin America." *Political Science Research and Methods* 1(2): 201-221

**TABLES AND FIGURES**

Table 4.1: Factor Analysis Results

| | **4 countries** | |
|---|---|---|
| | **Factor 1** | **Uniqueness** |
| *Principal components results* | | |
| Eigenvalue | 2.18 | |
| Adjusted Eigenvalue | 1.11 | |
| Cumulative Variance explained | 0.54 | |
| | | |
| *Variable and rotated factor loadings* | | |
| People-centrism | **0.87** | 0.25 |
| Anti-elite (morality) | **0.83** | 0.31 |
| Anti-elite (rhetoric) | **0.72** | 0.49 |
| Informal Style | **0.47** | 0.78 |
| *N* | 494, 4 parameters | |

Note: Eigenvalues are adjusted based on Horn's Test of principal components (using Stata library paran)

Table 4.2: Populism and Policy Appeals in Latin America

| | People-centrism | | Anti-elite (morality) | | The ideational approach | | Anti-elite (rhetoric) | | Informal Style | |
|---|---|---|---|---|---|---|---|---|---|---|
| Policy Dimension | (1) | (2) | (3) | (4) | (5) | (6) | (7) | (8) | (9) | (10) |
| Taxes vs. Spending | -0.18 | - | -0.26** | - | -0.31 | - | -0.18 | - | -0.37** | - |
| | (0.17) | | (0.13) | | (0.22) | | (0.12) | | (0.16) | |
| Social Policy | -0.08 | - | 0.05 | - | -0.06 | - | 0.08 | - | -0.07 | - |
| | (0.12) | | (0.11) | | (0.16) | | (0.11) | | (0.12) | |
| Environment | -0.12 | - | -0.06 | - | -0.15 | - | 0.14* | - | -0.30** | - |
| | (0.11) | | (0.10) | | (0.15) | | (0.08) | | (0.12) | |
| Religion | -0.16* | - | -0.13 | - | -0.22** | - | -0.19** | - | -0.04 | - |
| | (0.09) | | (0.08) | | (0.11) | | (0.08) | | (0.09) | |
| Privatization / Deregulation | 0.18 | - | 0.27 | - | 0.32 | - | -0.15 | - | 0.19 | - |
| | (0.19) | | (0.20) | | (0.28) | | (0.13) | | (0.16) | |
| Regional Cooperation | 0.12 | - | 0.04 | - | 0.14 | - | 0.44*** | - | 0.10 | - |
| | (0.11) | | (0.11) | | (0.15) | | (0.08) | | (0.10) | |
| Minorities | 0.10 | - | 0.05 | - | 0.12 | - | 0.07 | - | -0.05 | - |
| | (0.06) | | (0.07) | | (0.08) | | (0.05) | | (0.07) | |
| Individual Liberties / Security | -0.18* | - | -0.23*** | - | -0.29** | - | -0.02 | - | -0.25** | - |
| | (0.10) | | (0.09) | | (0.13) | | (0.09) | | (0.10) | |
| Relationship with the USA | 0.33*** | - | 0.17* | - | 0.42*** | - | 0.43*** | - | 0.46*** | - |
| | (0.11) | | (0.10) | | (0.14) | | (0.10) | | (0.11) | |
| Redistribution | 0.25 | - | 0.38** | - | 0.44** | - | 0.24** | - | -0.03 | - |
| | (0.15) | | (0.15) | | (0.22) | | (0.10) | | (0.13) | |
| The general left – right | - | 0.35*** | - | 0.42*** | - | 0.56*** | - | 0.71*** | - | 0.08 |
| | | (0.05) | | (0.05) | | (0.07) | | (0.04) | | (0.06) |
| Constant | 6.69*** | 6.17*** | 7.02*** | 5.72*** | 10.20*** | 9.03*** | 0.35 | 3.65*** | 12.29*** | 8.27*** |
| | (1.36) | (0.66) | (1.51) | (0.55) | (1.87) | (0.90) | (1.03) | (0.52) | (1.52) | (0.77) |
| N | 172 | 172 | 172 | 172 | 172 | 172 | 172 | 172 | 172 | 172 |
| R-squared | 0.48 | 0.19 | 0.51 | 0.34 | 0.53 | 0.26 | 0.79 | 0.60 | 0.49 | 0.01 |

Note: robust standard errors in parentheses. Standard errors are clustered on parties and presidents
*** p<0.01, ** p<0.05 * p<0.1

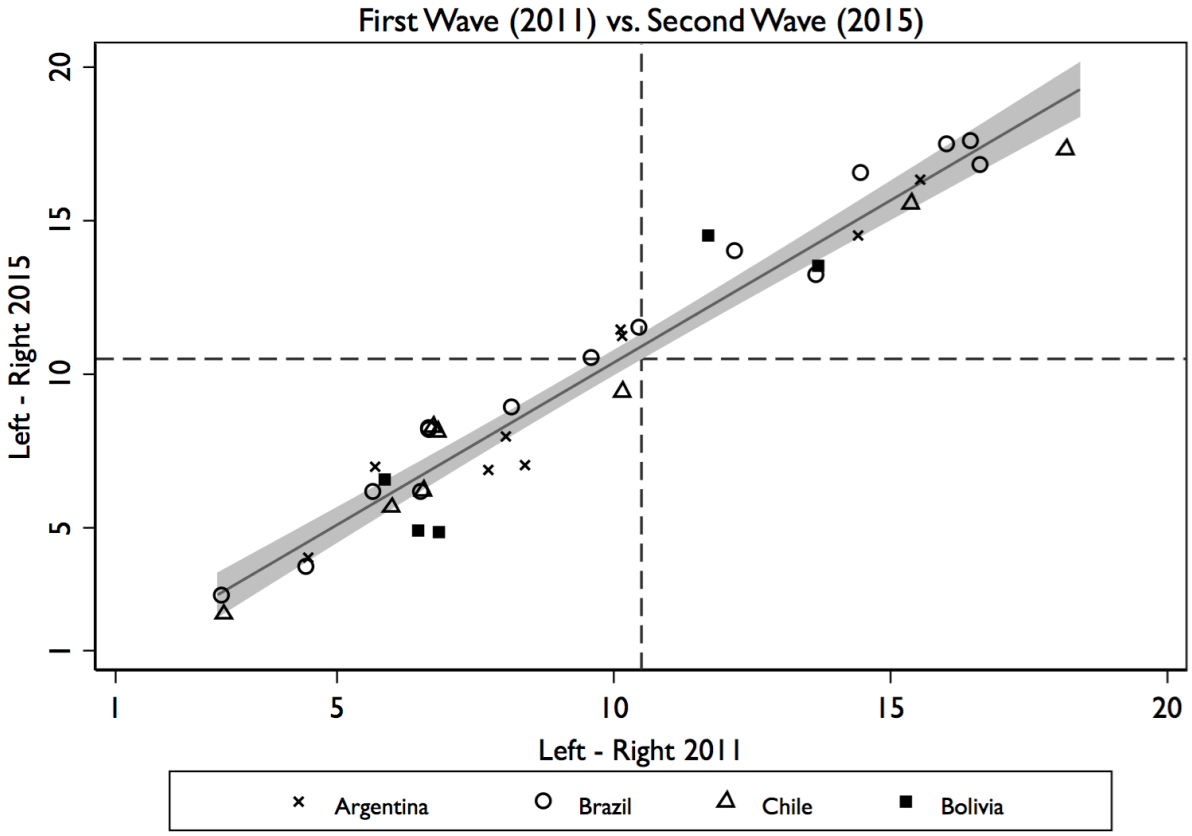


**Figure 4.1. The general left-right ideological dimension**

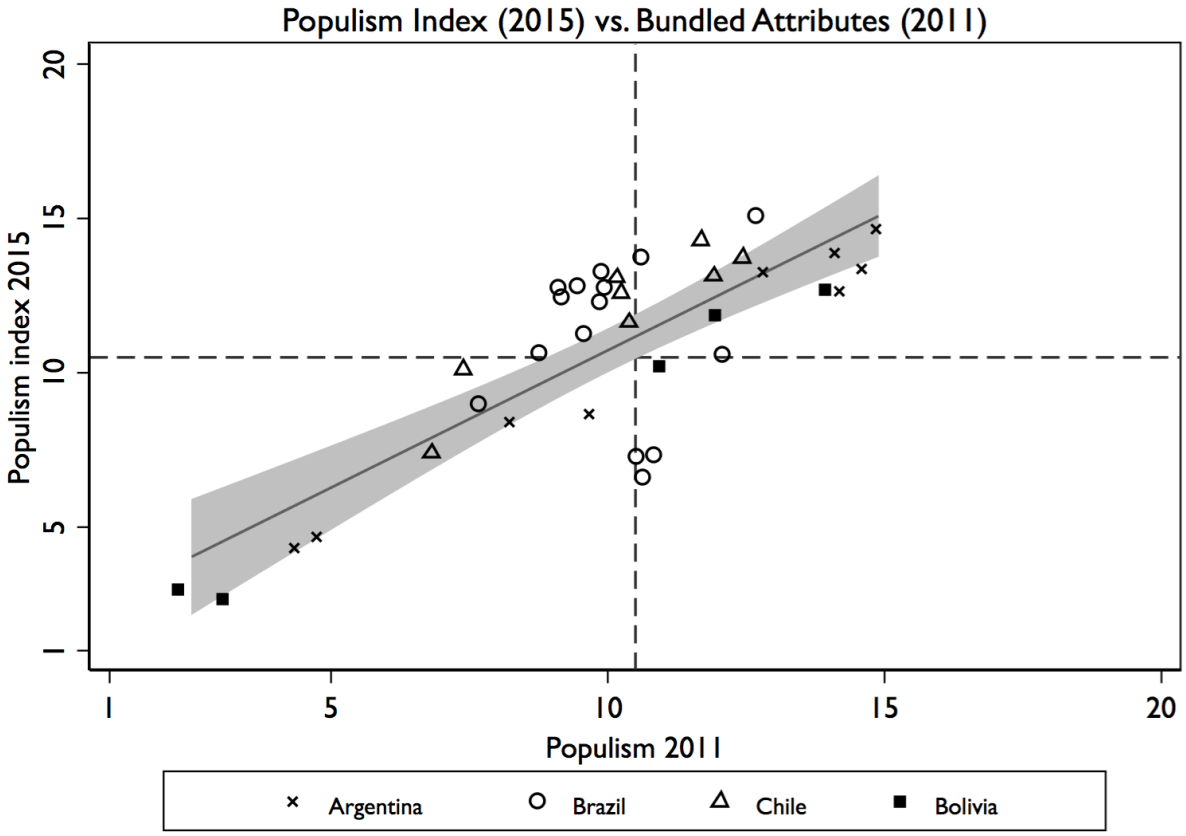


**Figure 4.2. Contrasting measurement approaches**

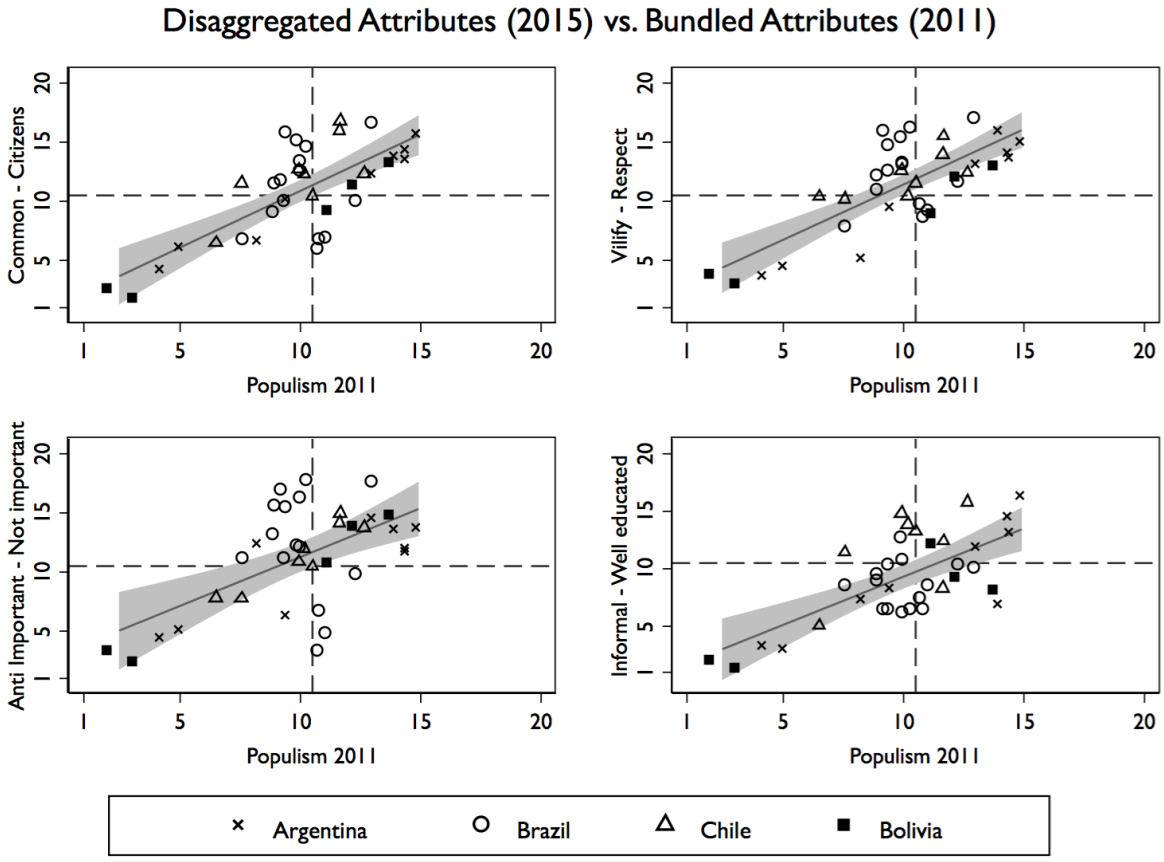


**Figure 4.3. Contrasting measurement approaches II**

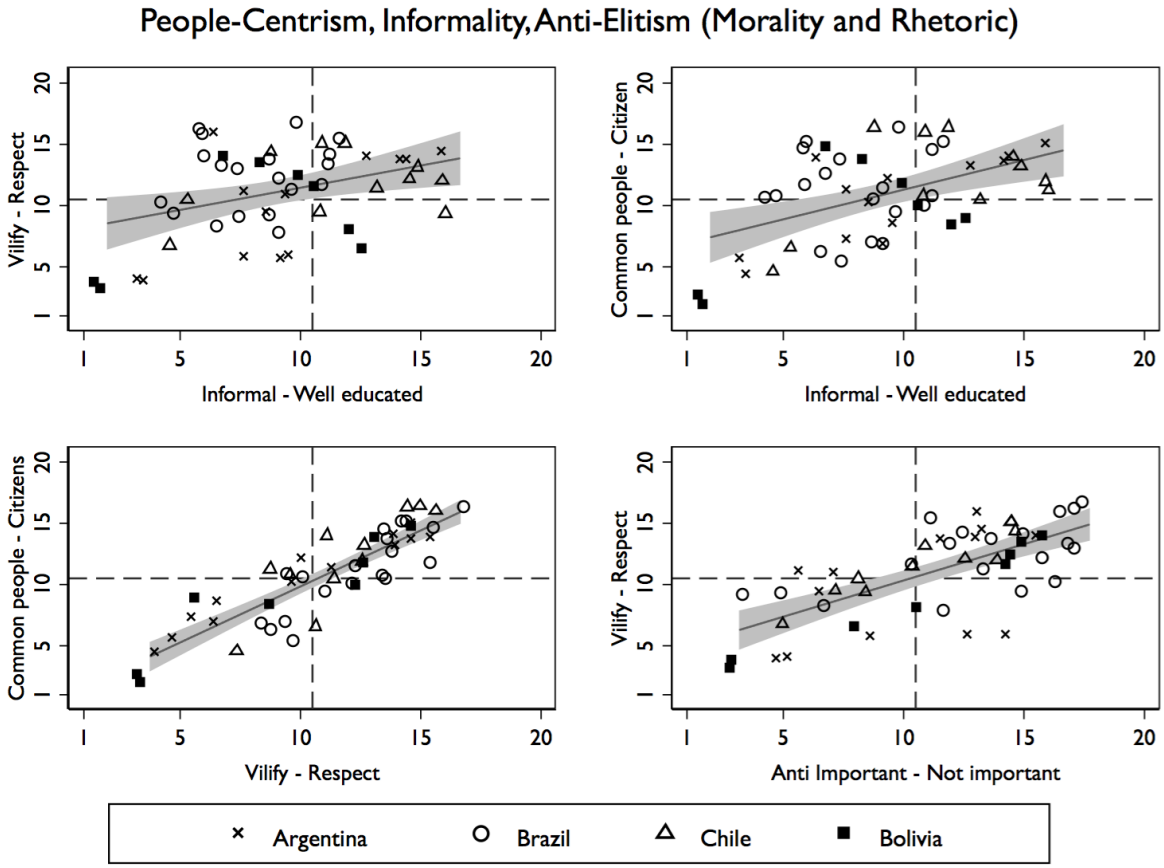


**Figure 4.4. Contrasting disaggregated dimensions**

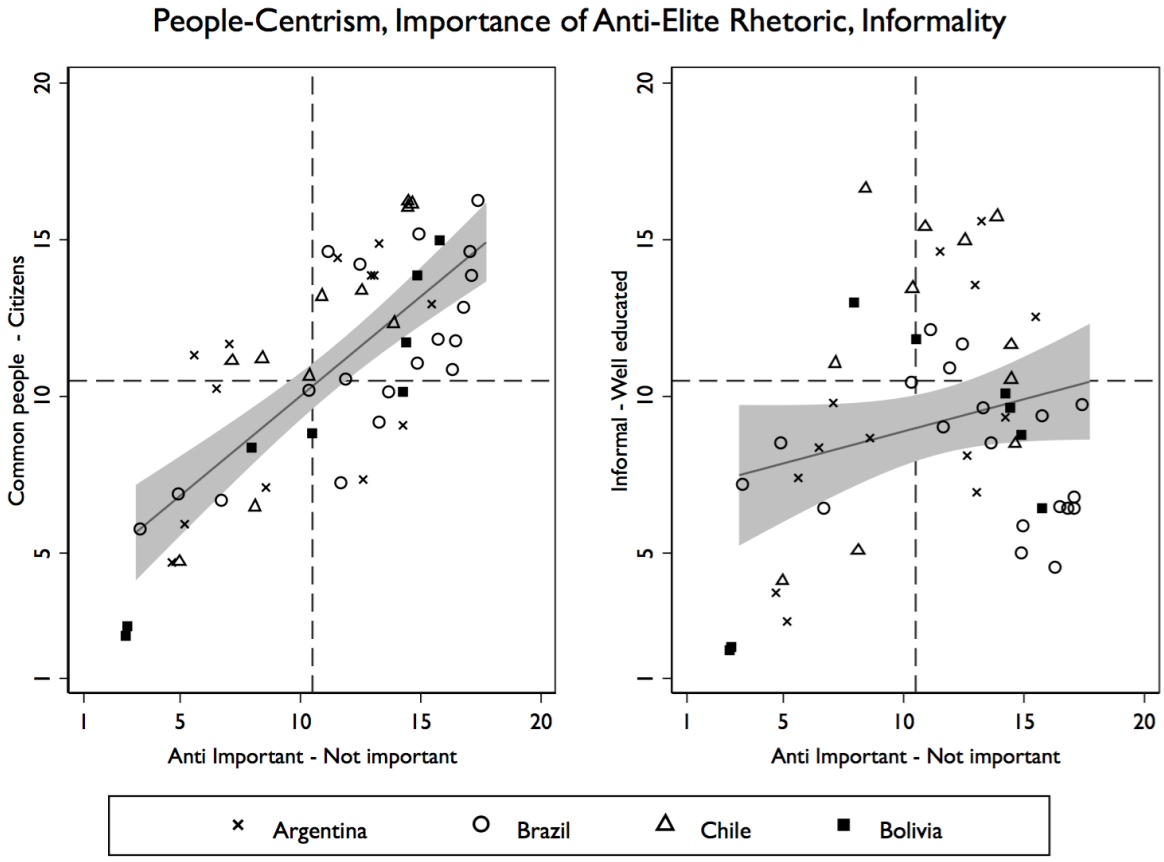


**Figure 4.5. Contrasting disaggregated dimensions II**