



Populism Barometer 2020

Populist Attitudes among Voters
and Non-Voters in Germany 2020

Robert Vehrkamp and Wolfgang Merkel



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About the study

This study is based on an online survey and is part of the Democracy Monitor project, which is being conducted jointly by the Berlin Social Science Center (WZB) and the Bertelsmann Stiftung. The survey, which is part of a large-scale survey panel representative of the German population, with which the Bertelsmann Stiftung and the WZB have been regularly surveying political attitudes and moods since April 2019, was conducted by YouGov Germany in a survey wave in June 2020 on behalf of the Bertelsmann Stiftung. A total of 10,055 people were interviewed.

The list experiment on the social desirability of populism as well as the conjoint analyses are based on a follow-up survey conducted in August 2020, also by YouGov on behalf of the Bertelsmann Stiftung. The participants in the June 2020 survey were invited to take part again. In total, 5,030 respondents accepted this invitation. For more details on the surveys analyzed in the Populism Barometer 2020, see the “Methodological appendix”, p. 82.

The YouGov quota sample was designed to represent German residents aged 18 and over, in terms of age, gender, education and Nielsen areas (microcensus). The data were additionally weighted according to age, gender, education and federal state in order to correct differences between the sample and the German population. The survey results are thus representative of the German population aged 18 and over. The statistical uncertainty of the results varies depending on the analysis, and in parts of the study we draw attention to this by displaying confidence intervals.

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Executive summary

Populism Barometer 2020:

Populist Attitudes among Voters and Non-Voters in Germany 2020

Turnaround in public opinion: populist attitudes have become much less pronounced and widespread, above all in the political center. As populism declines, populists have been put on the defensive. At the same time, further radicalization on the right is becoming a more serious danger.

Currently, only about two in ten German voters (20.9 percent) hold populist views. Thus, populism is down by about 11.8 percentage points — or by just over a third — compared with November 2018 (32.8 percent). At the end of 2018, about one in three voters had a populist attitude, whereas now, this figure has fallen to only one in five. The proportion of non-populist voters has increased by a similar amount. Compared with 31.4 percent at the end of 2018, almost half of all voters (47.1 percent) have now shown themselves to be non-populist in the Populism Barometer 2020. Thus, the proportion of non-populist voters has even risen by exactly half.

The strength of populist attitudes has also decreased considerably, particularly in the political center. The counter-mobilization of democratic anti-populism was also an anti-populist counter-mobilization of the political center. This shows that it is the political center, above all, which has turned out to be capable of learning from the process of confronting the temptations of populism.

The corona crisis may have stabilized and somewhat reinforced the turnaround in political attitudes in Germany. However, the corona effect is neither the cause nor the sole driver of this change. Already well before the crisis began, a shift had been achieved. On the one hand, it was driven by significantly improved and more inclusive work on the part of the government. On the other hand, we are beginning to see the learning effects brought about by democratic anti-populism in engaging with populists.

At the same time, the remaining populists are increasingly becoming a danger, especially on the right-wing margins. The first signs of this can be seen in their growing tendency to adopt right-wing extremist attitudes. This applies above all

to the AfD, which is moving away from the purely right-wing populist mobilization movement seen in 2016 and 2017, towards a party whose voters are increasingly characterized by right-wing extremist attitudes.

Turnaround in public opinion: a sharp decline in populist attitudes

In the year of the 2017 federal elections and the year afterwards, populist attitudes were widespread among German voters. In 2017, around three in ten voters held populist views. In fact, in the year after the federal elections, their populism became even stronger and more prevalent (Vehrkamp and Merkel 2018).

Currently, only about two in ten people in the German electorate (20.9 percent) hold populist views. That is 11.8 percentage points or slightly over a third less than in November 2018 (32.8 percent). Or to put it differently: while every third voter had a populist attitude at the end of 2018, now it is only every fifth.

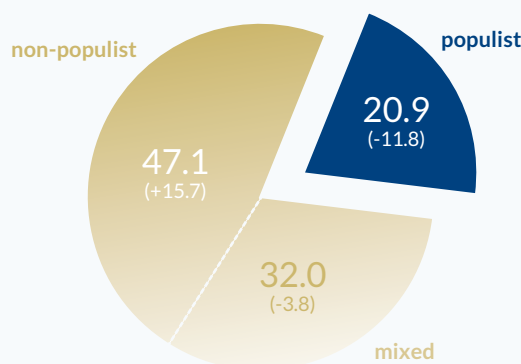
The proportion of non-populist voters has risen to a similar degree. Compared with 31.4 percent at the end of 2018, almost half of all voters (47.1 percent) have now shown themselves to be non-populist in the Populism Barometer 2020. Thus, the proportion of non-populist voters has even risen by exactly a half.

At the same time, the group of “mixed” (partly populist) voters has decreased by 3.8 percentage points to 32 percent. This reinforces the clarity of the trend. The decline in populist attitudes has not simply coincided with a similarly significant increase in “mixed” attitudes among voters. On the contrary: the increase in the proportion of non-populist voters was even noticeably greater than the decrease in the proportion of populist voters.

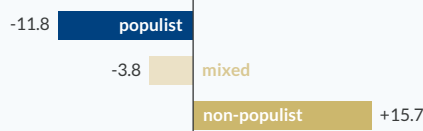
But there has not only been a sharp decrease in the proportion of populist voters. Populist attitudes have themselves also become much less pronounced. In comparison with the situation at the end of 2018, the tendency towards populism on average across the

How populist are the Germans?

As a percentage of all respondents



Change since 2018



Changes since November 2018 in brackets
Target population: German population aged 18 and over
(sample size 2020: 10,055).

Source: infratest dimap and YouGov
on behalf of the Bertelsmann Stiftung.

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electorate on the populist scale from 0 (non-populist) to 8 (populist) has sunk by 0.68 scale points to 4.66. That is by far the lowest level since the first surveys carried out for the Populism Barometer in spring 2017. Here, too, we can see that populists in Germany are once again on the defensive.

Not only corona: populism on the defensive

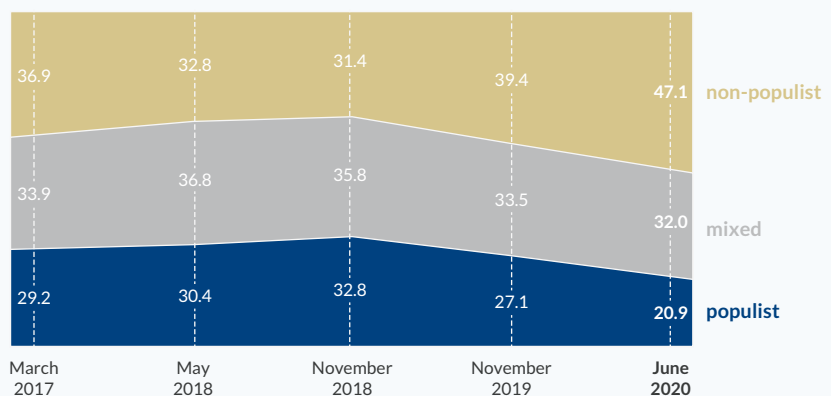
The turnaround in public opinion is certainly also an effect of increased approval ratings for politics and the government in the course of the corona crisis so far. But by no means exclusively. An antipopulist shift in public opinion had already been achieved in 2019, and was then stabilized and reinforced by the corona crisis.

This can also be seen when we trace the level of populism over time. On the one hand, the five data points in the Populism Barometer between March 2017 and June 2020 show the populist tendency of public opinion before and after the 2017 federal elections: while the proportion of voters with populist views rose from 29.2 percent in March 2017 to almost a third (32.8 percent) in November 2018, over the same period the proportion of non-populist voters sank from 36.9 percent to only 31.4 percent.

The populist wave in Germany reached its highest point so far at the end of 2018. By the end of 2019, the proportion of populists was already much lower and the proportion of non-populists was significantly higher than in the run-up to the 2017 federal elections. The turnaround had taken place, and the new trend continued as the corona crisis arrived in March 2020.

Populism over time

As a percentage of all respondents



Target population: German population aged 18 and over (sample size 2020: 10,055).

Source: infratest dimap and YouGov on behalf of the Bertelsmann Stiftung.

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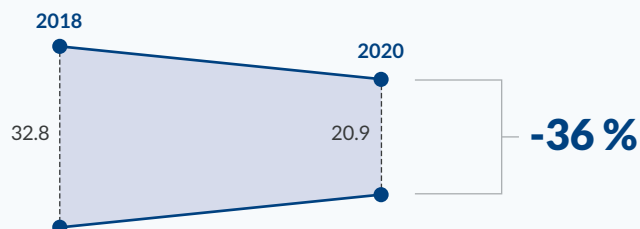
Whether the trend would have continued to be reinforced even without the crisis must remain a matter for speculation. The onset, development and political management of the crisis certainly have strengthened and reinforced the trend. The “return of trust” (Vehrkamp and Bischoff 2020b) in good, reliable and inclusive government action has also put the populists on the defensive. However, when it comes to learning from previous years and engaging politically with populists, it is important to note that the corona crisis was not the triggering factor.

Thus, democratic anti-populism does not necessarily need a “big crisis”, but can also succeed as a process of democratic self-assertion within everyday politics. 2019 was a good example of this. Liberal democracy responded to populist mobilization with a democratic counter-mobilization — also and especially in the political center. Thus, the counter-mobilization of democratic anti-populism was also an anti-populist counter-movement from the political center.

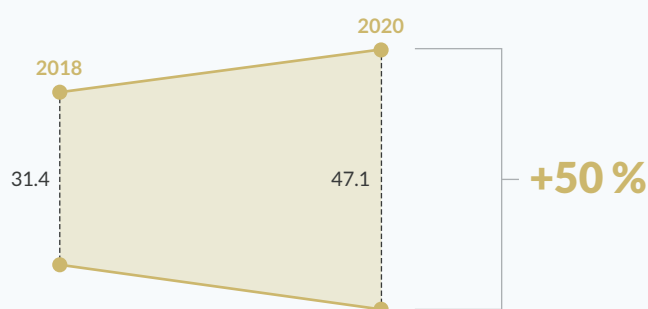
Populism on the defensive

As a percentage of all respondents

How the **populist** electorate has changed since 2018



How the **non-populist** electorate has changed since 2018



Change in percentage compared with November 2018

Target population: German population aged 18 and over (sample size 2020: 10,055).

Source: infratest dimap and YouGov on behalf of the Bertelsmann Stiftung.

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The decline of populism in the political center

This is particularly noteworthy because in recent years, the political center has often — and with reason — been described as democratically unstable, fragile and certainly not resistant enough to the temptations of populism and extremism. This was also a central finding of the Populism Barometer 2018, which pointed to the “increasing populism of the political center”. At that time, no other segment of the German electorate showed such a marked increase in populism as the political center. In particular, the right-wing populist AfD had succeeded in mobilizing the political center with its extreme brand of populism.

Against this background, it is important that the anti-populist shift is also being supported and driven particularly by the political center. This segment of the electorate is now much more resilient and resistant to populism than it was in the context of the 2017 federal elections. At any rate, democratic anti-populism and the anti-populist mobilization are currently being sustained and pushed forward from the political center of the electorate.

The proportion of non-populists in the political center of the electorate has risen by almost two thirds, from only 27 percent in May 2018 to 44 percent today. At the same time, the proportion of populists in the political center has declined from 34 percent to 23 percent. The sharp rise in the proportion of non-populists is particularly striking: their share in the political center rose much more steeply than it did across the electorate on average. While non-populism rose on average by 50 percent across the whole electorate, it rose by around 70 percent in the political center.

This shows that the political center is in fact particularly capable of learning from the past, taking action and resisting populist temptations. Public opinion is cooling towards populism, and the political center is proving to be a stabilizer and driver in this shift.

Much more resistant to populism: the party system before the 2021 federal elections

Analyzing the voters of each party in the political center leads to the same conclusion. Their populism has decreased sharply in strength and prevalence. Thus, for the moment, the CDU/CSU and the FDP have been prevented from sliding further into the populist voter segment. The CDU/CSU and FDP are therefore once again firmly anchored in the non-populist voter segment slightly to the right of the political center.

For the first time since 2017, the overall picture of all parties shows that the five parties slightly to the left and right of the political center (CDU/CSU, the Greens, SPD and FDP) are all clearly below average in their level of populism. This non-populist bloc of established parties in the political center currently represents just over 80 percent of all voters. The populism of the political margins is also much less pronounced than it was in 2017/2018.

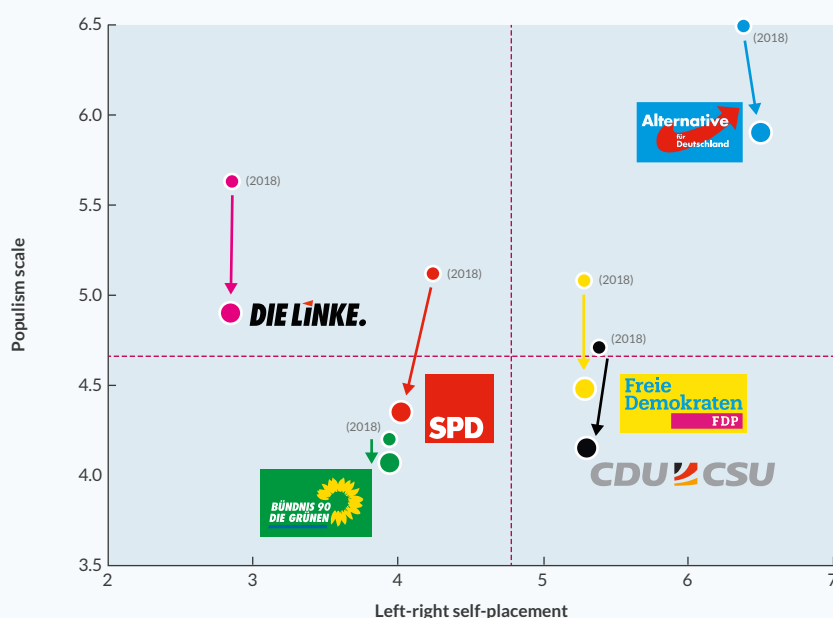
One of the most important results of the Populism Barometer 2018 was the creeping increase in populist attitudes in the traditional center. Voters of the CDU/CSU and FDP had shown themselves to be significantly more populist than in the election year 2017. This development has corrected itself again in the year before the 2021 federal elections: in the Populism Barometer 2020, voters in the traditional center were actually less populist than in the election year 2017. It seems that for the time being, their excursion into the realms of populism is over.

The temptation of the CDU/CSU and the FDP to follow, imitate or at least rhetorically adapt to the populism of the AfD has been recognized as a mistake and corrected. Voters in the left-liberal center had already largely escaped the populist dynamic of public opinion in Germany before and after the 2017 federal elections. In 2020, Green voters will remain the least populist of all in Germany, and the SPD's scale figures even show a slightly above-average decrease in the degree of populism of its voters. The voters of Die Linke are also currently less left-wing and are now less populist too. This means that they have moved closer to the positions of the SPD and the Greens.

Thus, the party landscape in Germany is much more resistant to populism in the year before the 2021 federal elections than it was before and after the 2017 elections.

Party voters by populism and left-right orientation

Significant changes since 2018 are represented by arrows.



Note: Points indicate average for each party's voters; dashed red lines indicate average of all eligible voters in 2020.

Target population: German electorate aged 18 and over (sample size 2020: 7,924).

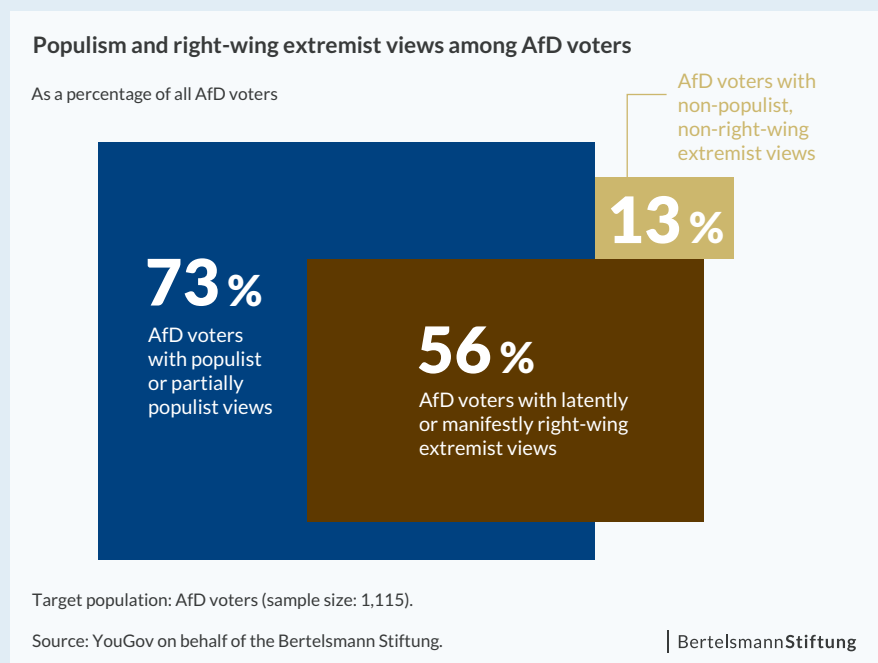
Source: infratest dimap and YouGov on behalf of the Bertelsmann Stiftung.

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AfD: increasing dominance of right-wing extremist attitudes

The AfD remains an extreme outlier in the German party landscape of 2020. It continues to occupy a position in the right-wing populist segment of the electorate which, in terms of populist attitudes and ideological orientation, is by far the furthest removed from all other parties and from the average of all eligible voters. With a score of 5.9 for populism and 6.5 for right-wing orientation, the AfD has even boosted its unique selling point as an extreme right-wing populist party.

For this reason alone, a closer look at the extent, degree and radicalism of its right-wing attitudes is interesting. How right-wing extremist are the voters of the AfD?



A clear majority (56 percent) of all AfD voters hold either latently right-wing extremist (27 percent) or even manifestly right-wing extremist attitudes (38 percent). At the same time, 73 percent of all AfD voters are either clearly populist (38 percent) or at least partly populist (35 percent). The proportion of AfD voters who are both non-populist and also not right-wing extremist is only 13 percent. Thus, almost nine out of ten AfD voters (87 percent) hold either very clearly or at least latently populist and/or right-wing extremist views.

In summary, the AfD has a unique selling point in the German Bundestag, not only as a right-wing populist mobilization movement, but also as a party whose voters are characterized by at least implicitly right-wing extremist attitudes. And the more populism dies down and populist voters from the center return to the mainstream parties, the more dominant right-wing extremist attitudes are becoming among AfD voters.

No alternative for Germany

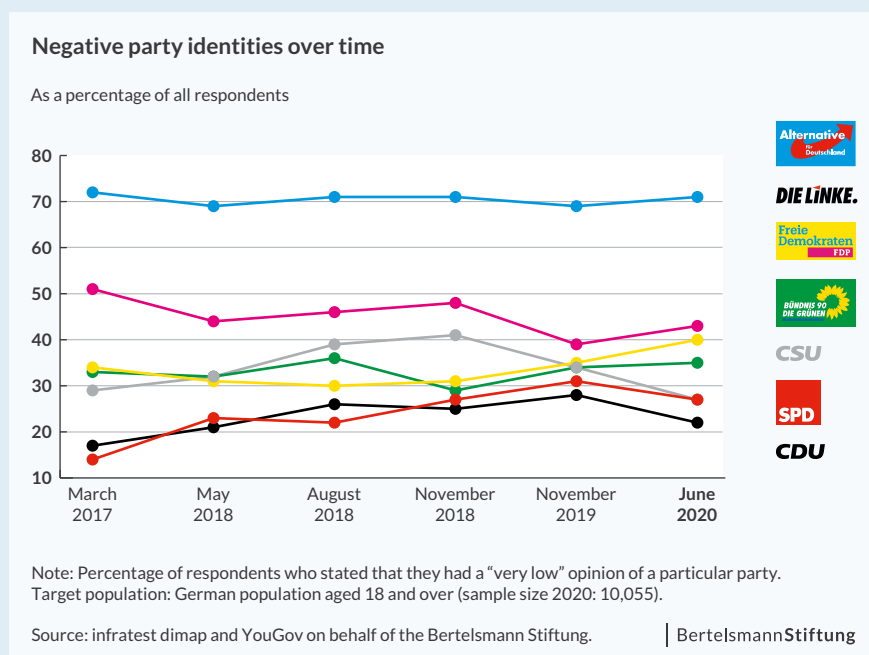
It is also particularly striking that the enormously high rejection rates of the AfD have not improved at all since it entered the German Bundestag. With a rejection rate of 71 percent among all German voters, its negative party identity is almost at the same level as in March 2017. Six months later, it succeeded in entering the Bundestag for the first time in the 2017 federal elections. Still, establishing its presence in parliament did not allow the AfD to improve its rejection rate. More than seven in ten German voters still have a “very low” opinion of the AfD, and would therefore be very unlikely to vote for the party in the near future.

This picture has shifted for Die Linke: in March 2017, its rejection rate was still at 51 percent, but it has now managed to reduce this to around 40 percent. In June 2020, it was therefore roughly on a par with the FDP.

At the end of 2018, the FDP was still in a very narrow range with the SPD, the Greens and the CDU/CSU, with around 30 percent rejection across all voters. Since then, its rejection rates have risen by a third to 40 percent, which is probably due above all to the way in which the party behaved after the state elections in Thuringia.

The parties of the Grand Coalition have had a different fate: they were only recently able to improve their ratings somewhat as part of their management of the corona pandemic.

In any case, the extremely low and stable “glass ceiling” for the AfD remains a key feature of negative party identities in Germany.



“More direct democracy” as an opportunity for mobilization

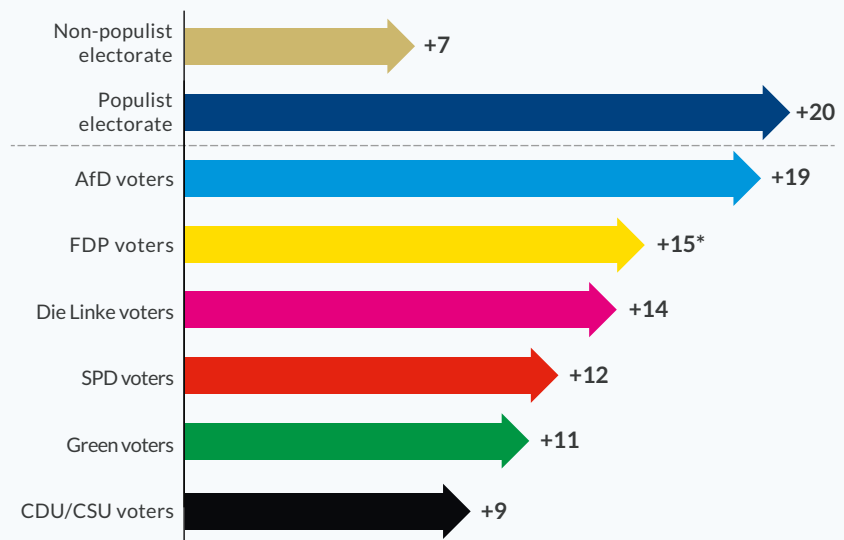
For anyone seeking an issue which appeals to populists and non-populists alike and could mobilize both groups, “more direct democracy” is the most promising choice — also in the upcoming federal election campaign in 2021.

Across the voters of all parties, high approval ratings for more direct democracy show that this is a topic with broad appeal. Within a range of nine to 19 percentage points, the ratings for all individual parties are somewhere between the values for non-populists and populists, and are at least just under a third more than the value for non-populists.

Although there are clear differences between the parties here, the issue of “more direct democracy” offers all parties the opportunity to gain approval and mobilize voters. Across the electorate, there is the greatest possible coalition for “more direct democracy”. This suggests that all parties could take advantage of this in the coming federal election campaign in 2021.

“More direct democracy” as a new opportunity for mobilization

Improvement of the approval for a candidate who advocates “many more referendums”



Mobilization effect in percentage points compared to the basic position “Supports far fewer referendums”.

*Note: The statistical uncertainty of the effect for FDP voters is greater due to a smaller number of respondents.

Target population: German population aged 18 and over in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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Turnaround: a sharp decline in populist attitudes

At the end of 2018, we warned at this point against the further rise in populism. The populist dynamic of public opinion had reached its peak. As we said at the time, populism in democracies is always a symptom. It is never successful without reason. Successful anti-populism means finding new solutions, building bridges, overcoming emerging lines of division, closing gaps in representation and reducing responsiveness deficits (Vehrkamp and Merkel 2018).

Has this been achieved? Does the decline of populism in Germany show that democratic anti-populism works? Are we seeing the effects of an assertive, self-critical approach to democracy?

At least partly: once the government crises of 2017/18 were overcome, a more inclusive and socially responsive form of governance did show results. The Grand Coalition's restrictive migration policy has weakened the mobilizing power of the migration and refugee issue. The Coalition had earned itself a bad reputation, but since early 2019 it has been working better. Socio-economic issues are coming more to the fore.

This has been reinforced by its crisis management in the corona pandemic, which has been well-received by many people so far. Although it was late to the point of negligence, the anti-populist reaction from the parties in the political center has also had an effect. The public and media debate on populism has improved. The effect of this would be even greater if there were less arrogance and cosmopolitan self-importance involved.

Moreover, the decline of populism in the center is reducing the mobilization potential of right-wing populism and leaving behind an increasingly right-wing extremist AfD. The right-wing populist mobilization movement of 2017/18 is becoming a party whose voters are increasingly characterized by right-wing extremist attitudes. The rise of right-wing populism has been pushed back for the time being. There are many indications that the trend is reversing.

However, it is still far too early to draw a final conclusion. The populist wave in Germany may have broken, but it has not yet ebbed away entirely. In other countries, it is leaving behind democracies permanently damaged by authoritarianism, even in Europe. And the populist temptation remains a latent presence in Germany too.

What is populism?

Below are various statements on politics and society. For each statement, please indicate the degree to which you agree:

		POPULIST ATTITUDES			
		strongly agree	mostly agree	mostly disagree	strongly disagree
1. The people are often in agreement but the politicians pursue quite different goals.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. I would rather be represented by a citizen than by a specialized politician.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Political parties only want peoples' votes and do not care about their opinion.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. The political differences between the elite and the people are much greater than the differences among the people.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Important questions should not be decided by parliament but by popular referendums.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. The politicians in the German parliament need to follow the will of the people.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. The people in Germany agree, on principle, about what should happen politically.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. What people call "compromise" in politics is really just selling out on one's principles.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Source: Own items as well as items taken from Hawkins et al. (2012) and Akkerman et al. (2013).

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BRIEF EXPLANATION: Populism as a particular idea of democracy is defined by the distinction between the "true people" and "corrupt elites", the notion of a general will of the people and the idea that society is homogeneous. From this, three constitutive dimensions of populism emerge: "anti-establishment", "pro-popular-sovereignty" and "anti-pluralism". In these three dimensions, it is also possible to measure populist attitudes empirically through surveys: the more strongly voters agree with statements and positions corresponding to the three dimensions of populism, the more populist they are. The eight items used to identify populism were developed and tested in numerous studies (e.g. Akkerman et al. 2013; Hawkins et al. 2012). Today they are largely accepted in this form or a similar form as a methodological standard for the comparative measurement of populist attitudes (Kaltwasser 2017; Van Hauwaert and van Kessel 2018). In order to understand populism, it is important to note that none of the three dimensions is enough on its own to identify populist attitudes. All three dimensions are necessary conditions for populism and have to be fulfilled simultaneously. The same also goes for the eight items: only when they all interact with each other at the same time do individual statements become an overall populist understanding of democracy and politics. Therefore, for our Populism Barometer, only someone who either "strongly" or "mostly" agrees with all eight statements counts as "populist". Respondents who "strongly disagree" with at least one statement, or who "mostly disagree" with at least half of the eight statements, are described as being non-populist. All other respondents are neither populist nor non-populist, and fall into the category of "mixed."

1. How populist are the Germans?

The extent and profile of populist attitudes among the German population in 2020

The political climate in Germany has clearly undergone a shift: the extent and intensity of populist attitudes have declined sharply since 2019, especially in the political center. The decline in populism has put populists on the defensive.

Currently, only about two in ten German voters (20.9 percent) have a populist attitude. This is 11.8 percentage points or just over a third less than in November 2018 (32.8 percent). Whereas in late 2018, about one in three voters was still populist, it is now only one in five. The proportion of non-populist voters has increased by a similar amount. Compared with 31.4 percent at the end of 2018, the Populism Barometer 2020 shows that almost half of all voters (47.1 percent) are non-populist. The proportion of non-populist voters has thus risen by exactly half.

The corona crisis has stabilized and somewhat reinforced the turnaround in public opinion in Germany. However, the corona effect was neither the trigger nor the sole driver of this turnaround. Already well before the beginning of the crisis, the shift had taken place. One of the drivers was

the much improved and more inclusive approach to governance after 2018. At the same time, we are beginning to see the learning effects brought about by democratic anti-populism in engaging with populists.

The distribution of populist attitudes remains – as in previous years – socially divided: those who are less educated and less well-off are more likely to hold populist views. Non-voters are still more populist than voters, and more highly educated voters still continue to overstate their populism. Thus, it seems that populist attitudes remain “socially desirable”, at least for some people.

At the same time, there is an increasing danger that the remaining populists on the right-wing margins will be radicalized. Indicative of this is their increasing tendency to overlap and merge with right-wing extremist attitudes. This applies above all to the AfD, which is developing from what was a quintessentially right-wing populist mobilization movement in 2016/17, becoming a party whose voters are increasingly characterized by right-wing extremist attitudes.

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Right-wing extremist attitudes among AfD voters

As a “thin ideology”, populism is an illiberal understanding of democracy. Populists think differently about democracy than non-populists; in particular, they are more illiberal and less pluralistic. When it comes to concrete ideological-political programs, populism can then combine with a wide range of “thick” or “complete” ideologies. Left-wing populists advocate convictions and attitudes which are programmatically left-wing, whereas right-wing populists adopt right-wing programs. What they have in common, however, is their populist understanding of democracy.

In Germany, right-wing populism predominates, and is embodied in party politics by the AfD. AfD voters have by far the most strongly populist attitudes, and also take up ideological positions furthest to the right of the political center (see Chapter 3, p. 63). For this reason alone, it is interesting to take a closer look at the nature, degree and radicalism of their right-wing attitudes.

How right-wing extremist are AfD voters?

The results of the Populism Barometer 2020 show a very distinct picture: a clear majority (56 percent) of all AfD voters are either latently right-wing extremist (27 percent) or even manifestly right-wing extremist (29 percent). At the same time, 73 percent of all AfD voters are either clearly populist (38 percent) or at least partially populist (35 percent). The proportion of AfD voters who hold both non-populist and non-right-wing extremist views is only 13 percent. Thus, nearly nine out of ten AfD voters (87 percent) either very clearly or at least latently have populist and/or latent right-wing extremist attitudes.

Right-wing extremist attitudes were measured by the 18 items in the “Questionnaire on right-wing extremist attitudes”, which is widely endorsed

by researchers. The questionnaire was developed by leading German political scientists in 2002 and has since been used in numerous studies to measure right-wing extremist attitudes (Decker and Brähler 2018; Zick et al. 2019). It defines right-wing extremist attitudes “as patterns of attitude which are characterized by particular ideas about inequality. In the political sphere, these are expressed by an affinity for dictatorial forms of government, chauvinistic attitudes, and a trivialization or justification of National Socialism. In the social sphere, they are characterized by antisemitic, xenophobic and social Darwinist attitudes” (Decker et al. 2012, p. 18; quoted and translated from German from Decker and Brähler 2018, p. 65). A list with the complete descriptions of all 18 right-wing extremist attitudes can be found in the methodological appendix of this study (p. 82).

The majority of AfD voters have right-wing extremist attitudes

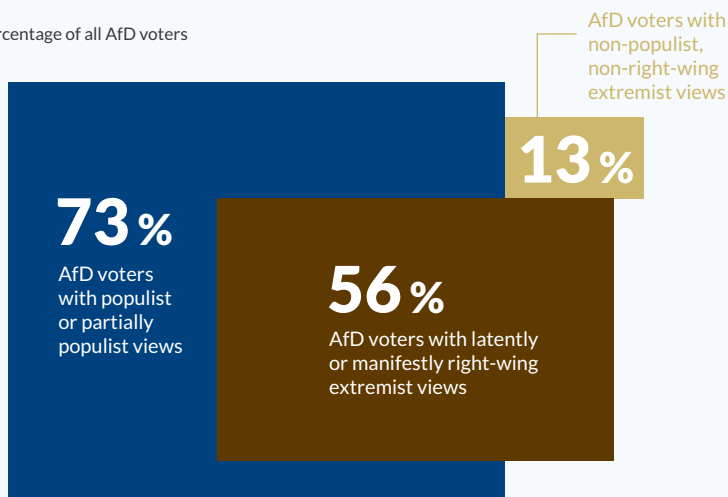
What do these results mean for the characterization of the AfD from the perspective of its voters?

First of all, the AfD’s share of manifestly right-wing extremist voters (29 percent) is about seven times higher than the average of the other parties, which would on average not even clear the five percent hurdle with their right-wing extremist voters. In comparison with the Greens (1.5 percent), the AfD’s percentage of explicitly right-wing extremist voters is even almost 20 times higher. In the other parties, the proportion is 5.5 percent for the CDU/CSU, 4.4 percent for the SPD, 4.9 percent for Die Linke and 4.7 percent for the FDP.

Moreover, similarly to most other right-wing extremist populist parties in Europe, the patterns of attitude found among AfD voters are dominated

Populism and right-wing extremist views among AfD voters

As a percentage of all AfD voters



Target population: AfD voters (sample size: 1,115).

Source: YouGov on behalf of the Bertelsmann Stiftung.

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by xenophobia. Significantly more than nine out of ten of all AfD voters (94 percent) are at least latently xenophobic. On average, almost the entire AfD electorate therefore agrees either entirely, mostly or partly with the following statements: “Foreigners only come here to exploit our welfare state”, “When there are not enough jobs, foreigners should be sent back to their home countries”, and “Germany has been infiltrated by foreigners to a dangerous degree”. Likewise, nine out of ten AfD voters (90 percent) explicitly or at least partially agree with chauvinistic statements. Antisemitic attitudes are latently or manifestly shared by just over four out of ten AfD voters (42 percent), while social Darwinist attitudes are espoused at least partially by almost four of ten of their voters (39 percent). In addition, 50 percent of all AfD voters latently or manifestly support a right-wing dictatorship, and 44 percent latently or manifestly trivialize National Socialism.

In summary, this picture shows:

Not only as a right-wing populist mobilization movement, but also as a party whose voters are characterized, at least latently, by right-wing extremist attitudes, the AfD has a unique selling point in the German Bundestag.

And the more populism fades away and populist voters from the center return to the established parties, the more dominant right-wing extremist attitudes are becoming among AfD voters.

Thus, the AfD is drifting deeper and deeper into the right-wing extremist voter segment. Its ideological voter profile is currently moving more in the direction of the right-wing extremist NPD than in the direction of the CDU/CSU and FDP, which are positioned slightly to the right of the political center.

What is populism?

Populism seems to be becoming the hallmark of democracy in the 21st century. Since the election of Donald Trump, Brexit and the rise of right-wing and left-wing populist movements even in many western democracies, there has been talk of a new “age of populism”. Populism has become the central challenge for the future of liberal democracies.

This challenge for practical politics is also reflected in research on democracy, leading to numerous new publications and to greater research efforts. While this has allowed us to develop more precise terminology and improve our understanding and knowledge of the forms and causes of populism (Kaltwasser et al., *The Oxford Handbook of Populism* 2017), it has not led to a generally accepted scientific consensus. For researchers, populism remains an ambiguous and variously used term, just as it does in public discourse. And the painstaking progress towards a scholarly consensus contrasts with public discussion and political debate over populism, which seem instead to be shaped by arbitrary attributions and prejudices. Ralf Dahrendorf has pointed out that the boundary between democracy and populism, as well as between electoral campaign debates and demagoguery, is not always easy to locate: “It is therefore necessary to be careful about the terms we use. The accusation of populism can itself be populist, a demagogic substitute for arguments” (Translated from German; Dahrendorf 2003, p. 156).

So, what is populism? How can we define it unambiguously and meaningfully, (how) can it be measured empirically, and which definitions and approaches to measurement are used by this Populism Barometer, in order to detect how populist the Germans are?

Today, populism is usually defined either in a broader sense as a socio-culturally shaped political style (Jagers and Walgrave 2007; Ostiguy 2018), a strategic form of political mobilization and organization (Roberts 2006; Wehland 2017) or, in a specifically ideological sense, as a particular idea of politics and democracy, of its norms, processes and functioning. Empirical research has taken up this ideological definition of populism and described it as a “thin ideology” (Mudde 2004). This means that populism is above all a particular understanding of democracy, its processes and its functioning, which is not connected *a priori* with a particular ideology. Rather, as a “thin ideology”, populism can be connected with a whole range of political programs and “thick” or “complete” ideologies, such as socialism, liberalism or conservatism (Mudde and Kaltwasser 2013; Stanley 2008).

The Populism Barometer is designed according to this ideological approach, and defines populism as a particular way of understanding the norms, institutions, processes and functioning of politics and democracy. On the one hand, this reflects the growing consensus, at least in empirical and comparative research. At the same time, this understanding allows us to operationalize the phenomenon of populism and to make it measurable through surveys, therefore enabling comparisons between countries and time periods. In addition, its conceptual clarity may help to reduce the arbitrary use of “populism” as a term in public and political discourse.

As a particular idea of “democracy”, populism is characterized by the distinction between a “true people” and “corrupt elites”, the notion of a general will of the people, and the notion of homogeneity in society. From this, three constitutive dimensions of populism emerge: “anti-establishment”, “pro-popular sovereignty” and “anti-pluralism”.

Three dimensions of populism









- The “anti-establishment” dimension defines populism as “an ideology that considers society to be ultimately separated into two homogeneous and antagonistic camps, ‘the pure people’ versus ‘the corrupt elite’” (Mudde 2004, p. 543). Populists argue that the corrupt elites push their own interests against the true interests of the pure people, whom they regard themselves as representing.
- The “pro-popular sovereignty” dimension goes on to define populism as the idea of and the demand for a direct and immediate rule of the people, so-called “popular sovereignty” (Mair 2002; Meny and Surel 2002). Populists therefore demand that important decisions be made directly by the people, unmediated and unfiltered by the institutions of liberal and representative democracy, and unadulterated by elitist and minority party interests.
- Finally, the “anti-pluralism” dimension defines populism as a political idea of homogeneity not only of the political elite but also of the people: each are seen as homogeneous units without differentiation into heterogeneous groups or individuals (Müller 2016; Mudde 2017). Populists therefore understand conflicts within society as conflicts between the “one” good and true people and the “one” corrupt and evil establishment.

Within these three dimensions, populist attitudes can also be measured empirically through surveys: the more strongly voters agree to statements and positions corresponding to the “anti-establishment”, “pro-popular sovereignty” and “anti-pluralism” dimensions, the more populist they are.

In the Populism Barometer, the level of populist attitudes is operationalized and measured based on the extent to which respondents agree with the following eight typical populist attitudes:

FIGURE 1 What is populism?

Below are various statements on politics and society. For each statement, please indicate the degree to which you agree:

		POPULIST ATTITUDES			
1. The people are often in agreement but the politicians pursue quite different goals.		strongly agree <input type="radio"/>	mostly agree <input type="radio"/>	mostly disagree <input type="radio"/>	strongly disagree <input type="radio"/>
2. I would rather be represented by a citizen than by a specialized politician.		strongly agree <input type="radio"/>	mostly agree <input type="radio"/>	mostly disagree <input type="radio"/>	strongly disagree <input type="radio"/>
3. Political parties only want peoples' votes and do not care about their opinion.		strongly agree <input type="radio"/>	mostly agree <input type="radio"/>	mostly disagree <input type="radio"/>	strongly disagree <input type="radio"/>
4. The political differences between the elite and the people are much greater than the differences among the people.		strongly agree <input type="radio"/>	mostly agree <input type="radio"/>	mostly disagree <input type="radio"/>	strongly disagree <input type="radio"/>
5. Important questions should not be decided by parliament but by popular referendums.		strongly agree <input type="radio"/>	mostly agree <input type="radio"/>	mostly disagree <input type="radio"/>	strongly disagree <input type="radio"/>
6. The politicians in the German parliament need to follow the will of the people.		strongly agree <input type="radio"/>	mostly agree <input type="radio"/>	mostly disagree <input type="radio"/>	strongly disagree <input type="radio"/>
7. The people in Germany agree, on principle, about what should happen politically.		strongly agree <input type="radio"/>	mostly agree <input type="radio"/>	mostly disagree <input type="radio"/>	strongly disagree <input type="radio"/>
8. What people call "compromise" in politics is really just selling out on one's principles.		strongly agree <input type="radio"/>	mostly agree <input type="radio"/>	mostly disagree <input type="radio"/>	strongly disagree <input type="radio"/>

Source: Own items as well as items taken from Hawkins et al. (2012) and Akkerman et al. (2013).

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The eight items used to identify populism were developed and tested in numerous studies (e.g. Akkerman et al. 2013; Hawkins et al. 2012). Today they are largely accepted, in this form or a similar form, as a methodological standard for the comparative measurement of populist attitudes (Kaltwasser 2017; Van Hauwaert and van Kessel 2018). As such, the concept used for measurement in the Populism Barometer corresponds to the current state of research. The first four statements relate to the opposition between the political elite and the citizens. They reflect the "anti-establishment" dimension of populism. The last four statements relate to the idea of the citizens as a homogeneous unit. They reflect the "anti-pluralism" dimension of populism. Finally, statements 2, 5 and 6 (counting from the top) emphasize the call for the direct rule of the people through referendums, and for representation by "ordinary citizens" instead of by parties and politicians. They stand for the "pro-popular sovereignty" dimension of populism.

In order to understand populism, it is important to note that none of the three dimensions is sufficient on its own to identify populist attitudes (Wuttke et al. 2020). All three dimensions are necessary conditions for populism and have to be fulfilled simultaneously. It is only their interplay which forms the ideological core of populism as an ideology of democracy which starts from the fiction of the pure people – equipped with a unified and true will – and perceives societal disputes as conflicts between the true will of the people and the egotistical interests of a political elite which is as homogeneous as it is corrupt.

The same interdependence also goes for the eight items which relate to the three dimensions of populism: thus, for instance, the wish for more referendums (item 5) is not yet populist in itself. But the demand for more direct democracy becomes populist when it is combined with the anti-pluralist fiction of a unified will of the people (item 7). Thus, just as the three dimensions of populism all have to be combined, the same goes for the eight populism items: only when they interact simultaneously do the individual statements become an overall populist understanding of democracy and politics. Therefore, for our Populism Barometer, only someone who agrees with all eight statements either “strongly” or “mostly” is counted as “populist”. Respondents who “strongly disagree” with at least one statement, or who “mostly disagree” with at least half of the eight statements, are described as being non-populist. All other respondents are neither populist nor non-populist, and fall into the category of “mixed.”

In addition to the degree of their populist attitudes, we also measured respondents’ ideological orientation. For this, we make use of the self-placement of the respondents on a left-right scale, on which they can locate their personal position on a scale from 0 for “left” to 10 for “right”.

With the help of these measurements, the extent, profile and changing shape of populist attitudes over time can be represented and analyzed. What are the findings of the Populism Barometer 2020? How populist are the Germans, and how has that changed since the federal elections in 2017 and the corona crisis? Have the Germans become less populist or more? And how “moderate” or “radical” is their populism? Does the populism of the right or left dominate, or that of the political center? And is populism more of an opportunity or a threat for democracy in Germany?

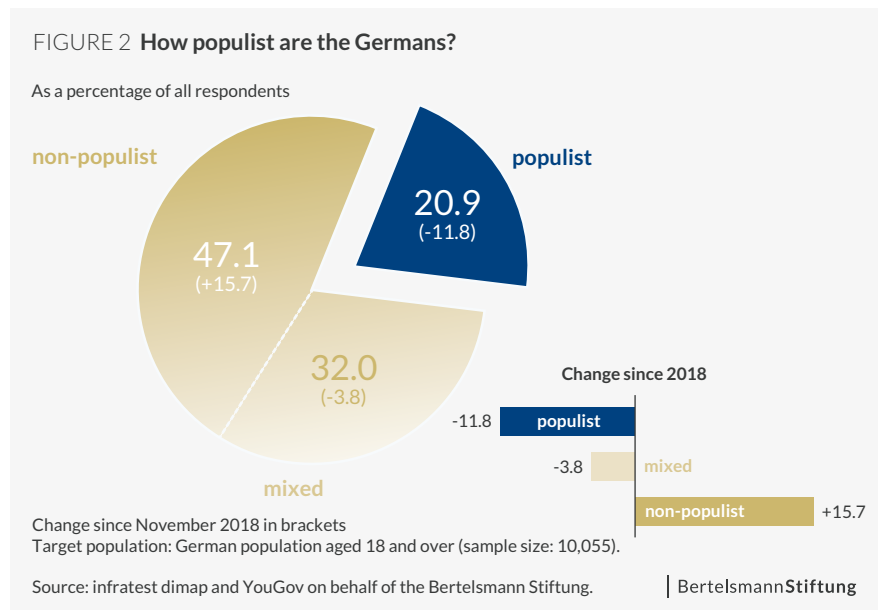
Not only corona: Populist attitudes have declined sharply since 2019

In the year of the 2017 federal elections and the year after, populist attitudes were widespread among voters in Germany. In 2017, about three in ten voters had populist attitudes. Their populism even became stronger and more widespread in the year after the federal elections.

This trend towards an increasing prevalence of populism in Germany has been turned around: already since 2019, populist attitudes among German voters have been on the decline. Populism has been put on the defensive in Germany. This is certainly also an effect of increased approval rates for politics and the government in the course of the corona crisis so far (Vehrkamp and Bischoff 2020b; Brand et al. 2020), but by no means exclusively. Already during 2019, an anti-populist shift

in public opinion had taken place. The corona crisis then stabilized and reinforced this reversal of the trend.

If we compare the current figures from the Populism Barometer 2020 with the previous years, the following picture emerges:



Currently, only about two in ten eligible voters in Germany (20.9 percent) have populist attitudes. This is 11.8 percentage points or just over a third less than in November 2018 (32.8 percent). Or to put it another way: while at the end of 2018, one in three voters still had a populist attitude, this figure has now fallen to one in five.

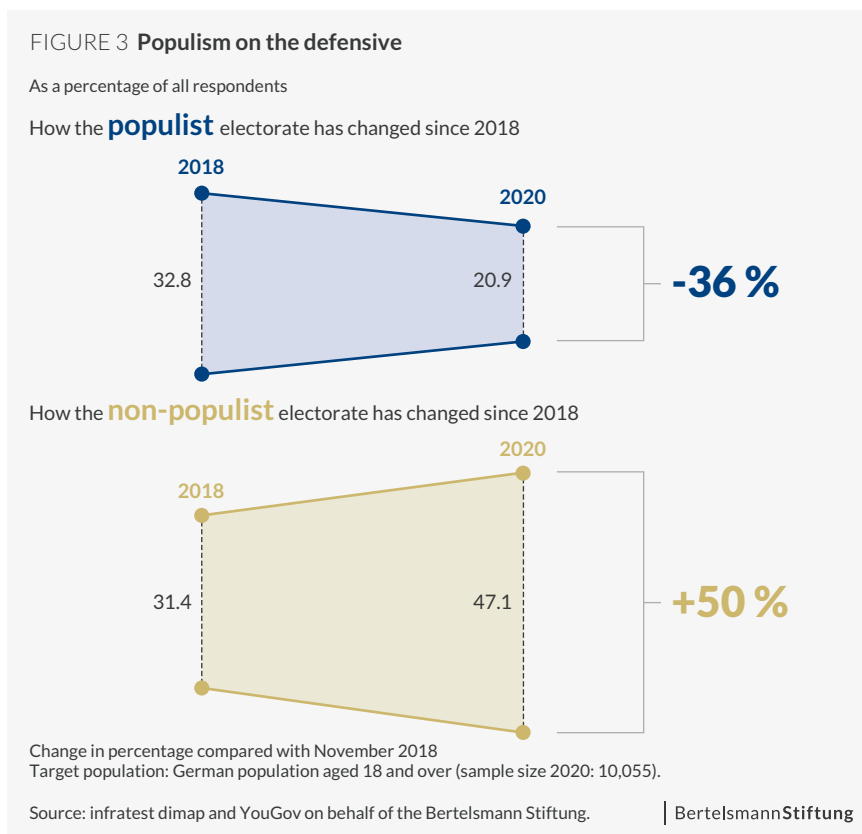
The proportion of non-populist voters has increased by a similar amount. Compared with 31.4 percent at the end of 2018, the Populism Barometer 2020 shows that almost half of all voters (47.1 percent) are non-populist. The proportion of non-populist voters has thus risen by exactly half (see Figure 2). At the same time, the group of “mixed” voters who are partly populist has fallen by 3.8 percentage points to 32 percent. This reinforces the clarity of the trend. The decline in populist attitudes has not simply been accompanied by a similarly high increase in “partly” populist voters. On the contrary: the increase in the proportion of non-populist voters was even more pronounced than the decrease in the proportion of populist voters.

But it is not only the proportion of populist voters that has fallen sharply. Populist attitudes have also become much less pronounced. In comparison with the situation at the end of 2018, the tendency towards populism on average across the electorate on the populist scale from 0 (non-populist) to 8 (populist) has sunk by 0.68 scale points to 4.66. This is by far the lowest level since the first Populism Barometer survey was conducted in spring 2017. Once again, this shows that populists in Germany are back on the defensive.

Populism on the defensive

The extent to which the mood in Germany has cooled down again since the populist peak at the end of 2018 can be seen even more clearly if we explicitly compare the high point of the populist wave at the end of 2018 with the current state of affairs. At the end of 2018, almost exactly one third of all voters were populist. Every third voter either “strongly” or “mostly” agreed with all eight test questions on populist attitudes. For the Populism Barometer, even a partial rejection of just one of the eight different populism items indicates a “partial” populist attitude rather than a populist one. The degree and strength of populism in the group of populist voters is therefore very high. The criterion for populists is formulated relatively strictly in the Populism Barometer: those who agree with all eight items are very significantly and unambiguously populist. At the end of 2018, this was true of nearly one-third of German voters.

Comparing these different points in time illustrates a change in public opinion since the end of 2018 which comes close to a landslide:



The reduction in the proportion of populist voters from just under a third (32.8 percent) at the end of 2018 to just over a fifth (20.9 percent) corresponds to a decline of more than a third (-36 percent). The Populism Barometer 2018 showed that populist sentiment was continuing to rise, with the proportion of populists increasing by 1.2 percentage points from 29.2 percent before the 2017 federal

elections to 30.4 percent in May 2018, while the proportion of non-populist voters decreased by 4.2 percentage points from 36.9 to 32.8 percent (Vehrkamp and Wratil 2017; Vehrkamp and Merkel 2018). Even these comparatively small changes were statistically significant in the overall trend and showed that the populist climate in public opinion was becoming increasingly intense in the course of 2018.

Compared to this, there are good reasons to describe the subsequent reversal of the trend as resembling a landslide: the increasing dominance of populist attitudes has been overcome. The momentum of self-reinforcing populism has been stopped and turned into its opposite. The dominant trend in public opinion is no longer populist, but is once again clearly less populist than at the time of the last federal election.

This is also shown to an even greater extent by the proportion of non-populist voters: at the end of 2018, non-populism fell to its lowest level to date in the Populism Barometer, sinking to less than a third (31.4 percent) of voters in Germany, whereas now this figure has risen again to almost half of all eligible voters (47.1 percent). Almost every second voter in Germany is currently very clearly and distinctly non-populist.

Thus, the German population is much more resistant to populism in the year leading up to the 2021 federal elections than it was before and after the 2017 elections.

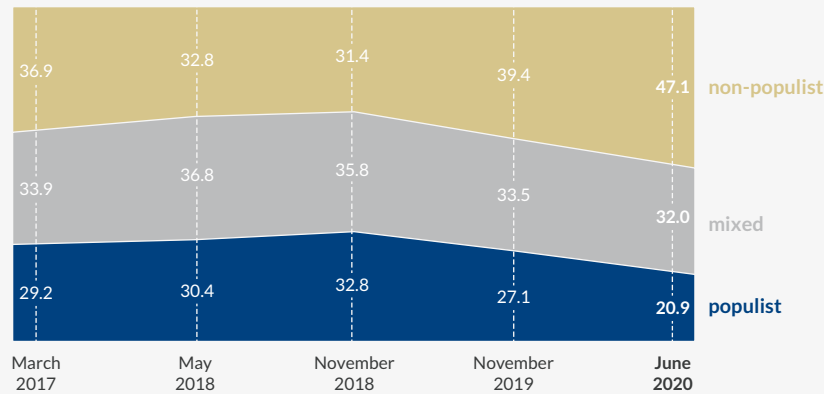
A turnaround in public opinion?

The picture of a reversal in the trend of public opinion also emerges when we compare the levels of populism over time. The five data points presented in the Populism Barometer between March 2017 and June 2020 show that the climate of public opinion was heavily loaded with populism before and after the federal elections in 2017. While the proportion of populist voters rose from just over 29 percent in March 2017 to almost a third (32.8 percent) in November 2018, the proportion of non-populist voters fell from 36.9 percent to only 31.4 percent over the same period. Thus, Germany reached the peak of a populist wave at the end of 2018. The data points then show a reversal in the trend: by the end of 2019, the proportion of populists was already significantly lower and the proportion of non-populists significantly higher than in the run-up to the 2017 federal elections. The turnaround was successful and continued with the onset of the corona crisis in March 2020. What is striking here is that the change was already constant in prevalence and intensity over the course of 2019. Although the decline in the proportion of populist voters this year was slightly more pronounced than in the course of 2019, the difference in the strength of the effect remains marginal. What is much more noticeable is how consistently and uniformly the climate among German voters has moved towards non-populism.

The overall picture shows: the reversal in the trend of public opinion among German voters began as early as 2019 and is still continuing. Although it was stabilized and slightly intensified by the corona crisis, it was neither triggered nor driven solely by the corona effect. The shift was accomplished well before the crisis began. By the end of 2019, half a year before the start of the coronavirus crisis, the electorate had already completed half of the journey away from the intense populism of 2017/18. Whether the trend would have continued and intensified even

FIGURE 4 Populism over time

As a percentage of all respondents



Target population: German population aged 18 and over (sample size 2020: 10,055).

Source: Infratest dimap and YouGov on behalf of the Bertelsmann Stiftung.

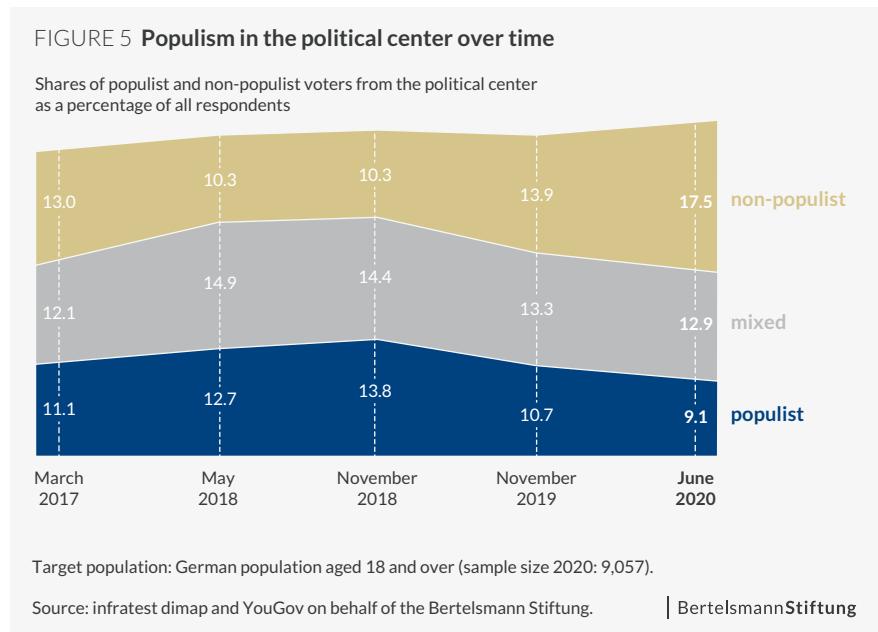
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without the crisis must remain a matter of speculation, however. The eruption of the crisis, the course it took and the way in which it was managed politically have certainly also strengthened and reinforced the trend. The “return of trust” (Vehrkamp and Bischoff 2020b) in good, reliable and inclusive government action has also put populists even more on the defensive. However, when it comes to learning from previous years and engaging politically with populists, it is important to note that the corona crisis was not the triggering factor. Democratic anti-populism had already brought about a shift in the political climate before the crisis began, and this was then stabilized and strengthened by the corona crisis. However, even before and without the crisis, this shift had already been achieved in the course of 2019 in democratic discourse and an increasingly combative and constructive debate among established parties and democratic institutions. Democratic anti-populism therefore does not necessarily need a “major crisis”, but can also succeed as democratic self-assertion in everyday politics. 2019 is a very good example of this. Liberal democracy responded to populist mobilization with democratic counter-mobilization, also and especially from the political center.

The decline of populism in the political center

The counter-mobilization of democratic anti-populism was also an anti-populist counter-movement from the political center. This is particularly noteworthy because the political center has often, and with reason, been described as democratically unstable, fragile and at any rate not resistant enough to populist and extremist temptations (Zick et al. 2019; Decker and Brähler 2018). One of the central findings of the 2018 Populism Barometer was an “intensifying populism in the political center” (Vehrkamp and Merkel 2018). At that time, no other segment of the German electorate showed such a marked increase in populism as the political center. The right-wing populist AfD, in particular, had succeeded in mobilizing extreme populism in the political center.

Against this background, it is important that the anti-populist turnaround is now also being underpinned and driven particularly from the political center, which has thus shown itself to be much more resilient and resistant to populism than it was in the context of the 2017 federal elections. At any rate, democratic anti-populism and anti-populist mobilization are currently being strongly supported and driven by the political center of the electorate.



Across the electorate, the proportion of non-populist voters in the political center has risen by a good two thirds, from just one tenth (10.3 percent) at the end of 2018 to 17.5 percent. At the same time, the proportion of populists in the political center has fallen from 13.8 percent of all voters to only 9.1 percent. The sharp rise in the proportion of non-populists is particularly striking: their share of the political center rose even more significantly than it did on average across the electorate. While the average increase was already 50 percent across all voters, it is as high as 70 percent in the political center.

This shows that the political center is in fact particularly capable of learning from the past, taking action and resisting populist temptation. Public opinion is cooling towards populism, and the political center is proving to be a stabilizer and driver in this shift.

Populist attitudes still remain “popular”

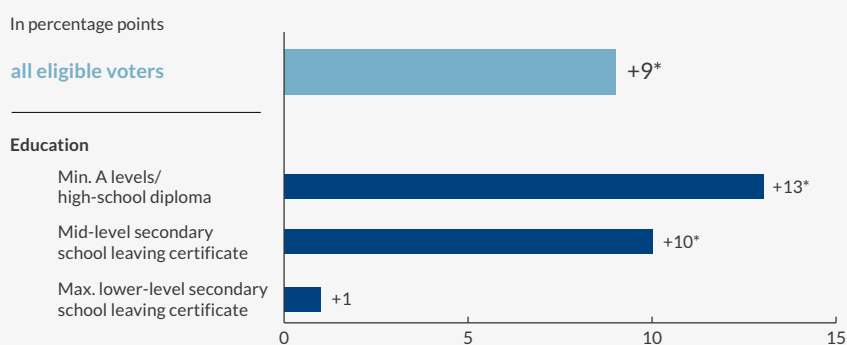
Despite the very clear turnaround in public opinion, populist attitudes are still “popular”, especially among people with a high level of formal education. In surveys, they overstate their populism. They express themselves as being more populist than their actual attitudes would demand. Their “true” populism is therefore lower than their “expressive” populism. This can be interpreted as

an indication that the social desirability of populist attitudes is still pervasive. Experimental survey research has shown that more educated people in particular tend to express and position themselves in a “socially desirable” manner in surveys. They adopt attitudes that they tend to regard as politically mainstream and thus socially desirable. The more educated they are, the more aware they are of these connections, and the more they direct their answers according to perceived patterns of social acceptance and desirability. Such patterns can be determined by experimental survey research based on a comparison of “openly” and “covertly” expressed attitudes, working on the assumption that preferences and attitudes which people express “covertly” are closer to their true attitudes than those which they express “openly”.

The Populism Barometer 2020 still continues to show a significant level of exaggeration in this survey experiment. On average for all respondents, the exaggeration effect is nine percentage points. When we distinguish according to formal education, however, the effect is statistically significant only for the two more highly educated groups. For voters with at least A levels (“Abitur”) or a high-school diploma, the exaggeration effect is 13 percentage points, whilst for respondents with a mid-level school leaving certificate (“Mittlere Reife”), it is ten percentage points. For voters with at most a lower-level school leaving certificate (“Hauptschulabschluss”), on the other hand, it is not statistically significant, at just one percentage point.

This means that the pattern of populist exaggeration corresponds to what is known from survey research: the more highly educated people are, the more they tend to respond in a socially desirable way. Many formally higher educated people still consider populist attitudes towards politics, parties and democracy to be more socially desirable. This can be interpreted as an indication that populism still exists, at least in a latent form, among those whose “true” attitudes are mostly non-populist, or

FIGURE 6 Popular populism – social desirability of populist attitudes



Note: Values are average difference between approval for an item in direct questioning and approval in the list experiment (averaged across three items).

Method: Values for “true” populism were determined through linear regressions of the list experiment counts with a dummy variable for “treatment list”; statistical significance of the difference is based on “difference-in-means” test; * $p < 0.01$.

Target population: German population aged 18 and over in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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at least less populist than the views which they articulated openly in the survey experiment. Although they are actually not or no longer really populist, they still consider it advantageous to express populist views in public discourse.

In contrast, the exaggeration effect among voters with a low level of formal education is not statistically significant. In the Populism Barometer 2018, on the other hand, a significant exaggeration effect was also discernible in this group, at least for individual populist attitudes (Vehrkamp and Merkel 2018, p. 29). Even if the items used were not completely identical, this could be interpreted in 2018 as further evidence for an intensely populist political climate. Even those who were less educated further exaggerated their already much more pronounced populism. This effect, at least, can no longer be detected in the Populism Barometer 2020 (for more details, see methodological appendix, p. 82).

Right-wing extremist attitudes increasingly unpopular

In the Populism Barometer, populist attitudes are initially defined and measured independently of ideological left-right orientation. However, respondents then place themselves on a left-right scale from 0 (left) to 10 (right), which allows us to draw conclusions about the extent to which people with populist attitudes position themselves on the left, on the right or in the political center. To simplify these connections, self-placements are divided into five groups: on the left-right scale, we refer to positions at 0, 1 or 2 as “left”, at 3 or 4 as “center-left”, at 5 as “center”, at 6 or 7 as “center-right” and at 8, 9 or 10 as “right”. We can then analyze how many respondents are populist or non-populist in each of these groups. This shows the ideological shape of populism and allows conclusions to be drawn about the relative strength of populist attitudes in the various ideological voter segments.

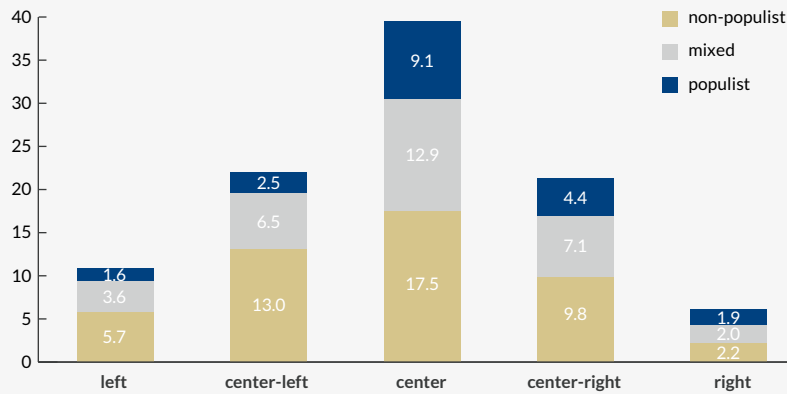
Even though populism is declining sharply in the political center, the following remains true: populism is not exclusively a phenomenon of the political margins. Slightly less than half of all populist voters place themselves in the political center (9.1 percent). Despite the overall decline in populism, which is slightly above average in the political center, populist attitudes remain very present there in the run-up to the 2021 federal elections. However, with almost twice as many non-populists (17.5 percent), the political center is also much more resistant to populism than it was in the period of the 2017 elections.

This picture becomes even clearer when the proportions of populist and non-populist voters are viewed as shares of each ideological group. In the political center, less than a quarter (23 percent) of all voters are currently populist. In the previous year, this figure was 28 percent (-5 percentage points) and in the 2018 Populism Barometer even more than a third (34 percent). The increase in the number of non-populists was even greater: whereas in 2018, the Populism Barometer showed that only just over a quarter (27 percent) of all voters in the center were non-populists, in 2020 the figure is almost two thirds higher at 44 percent.

This proportional view also shows that populism is again most strongly represented in the ideologically right-wing spectrum this year. Three out of ten voters located on the extreme right are populists. On the far left, this is less than half as many (14

FIGURE 7 Populism and left-right orientation I

As a percentage of all respondents



Note: Discrepancies in the sum totals of populism groups are due to respondents who could not be located on the left-right scale.

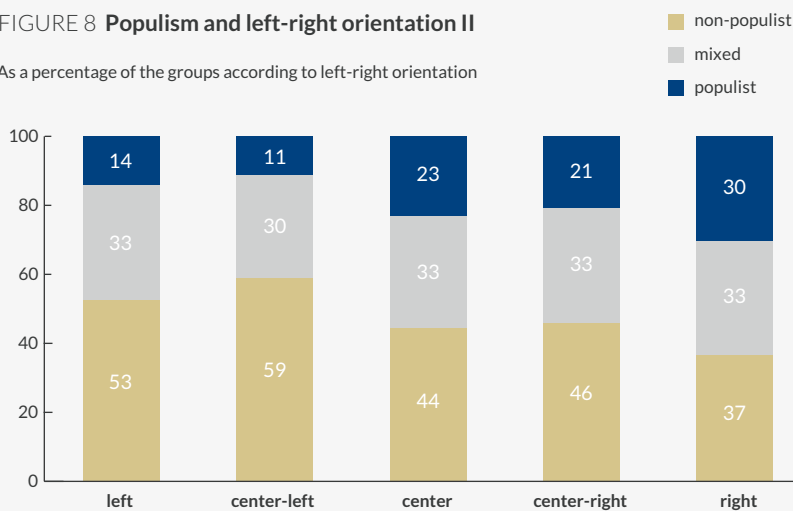
Target population: German population aged 18 and over in 2020 (sample size: 9,057).

Source: YouGov on behalf of the Bertelsmann Stiftung.

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FIGURE 8 Populism and left-right orientation II

As a percentage of the groups according to left-right orientation



Target population: German population aged 18 and over in 2020 (sample size: 9,057).

Quelle: YouGov im Auftrag der Bertelsmann Stiftung.

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percent). In addition, the proportion of explicit non-populists is at its highest to the left of the political center: significantly more than half of all far-left voters (53 percent) and the center-left voters (59 percent) are largely resistant to populism.

Populism in Germany is thus still far more often associated with right-wing than with left-wing orientations. Right-wing populism, measured in this way, is proportionately more than twice as pronounced as left-wing populism. Nevertheless,

in purely numerical terms, there are as many left-wing populists in Germany as there are right-wing populists. But because there are more people who ideologically place themselves on the far left and fewer who place themselves on the far right, the relative weight of populists is greater on the right. When it comes to their internal resistance to populism, far-left voters once again differ fundamentally from far-right voters: while, as mentioned above, more than half (53 percent) of far-left voters are not populist, this figure is only just over a third on the far right (37 percent).

Thus, in the year before the 2021 federal elections, right-wing ideology again proves to be much more susceptible to populism and less resistant to populist mobilization than an ideologically left-wing or even far-left self-placement.

The social divide in populism is decreasing

If one analyzes the social profile of people with populist attitudes, the Populism Barometer 2020 remains very clear: populism in Germany is socially divided. The lower their level of formal education and the lower their income, the more populist people are, while higher levels of education and income are associated with a lower degree of populism. There are also differences according to age and gender, but they are less significant and less clear.

The social divide in populism has thus not disappeared, but it has declined noticeably, and is less sharp than it was at the time of the 2017 federal elections. At any rate, the social divide in 2017 and 2018 was much more dramatic than it is now. Before and in the year after the last federal election, about twice as many people with the highest level of education were non-populist. At the same time, almost three times as many people from the group with the lowest formal education were populist than in the highest group. The picture was similar for income: in the group with the lowest income, the proportion of populists was more than twice as high as it was in the highest income group. At the same time, only about half as many people had non-populist attitudes. This very deep social division in populism has since been significantly reduced.

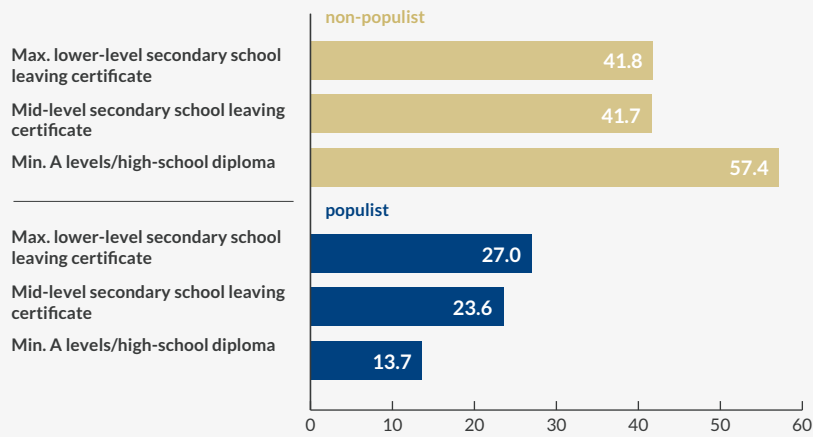
Currently, about six out of ten people in the highest income group and the group with the highest level of formal education display non-populist attitudes. In the highest educational group, with at least Abitur or a high-school diploma, 57.4 percent are non-populist. In the highest income group, with over € 4,000 monthly income, it is even 60.9 percent. Meanwhile, only about one seventh of all people in each of these two groups are populist: the figure is 13.7 percent for the highly educated, and 13.5 percent for those with a high income.

The reverse can be seen in the groups with the lowest levels of education and income, in which only about four in ten people are non-populist and about a quarter are populist. In the lowest educational group, the proportion of non-populists is 41.8 percent and the proportion of populists 27 percent. In the lowest income group, with a monthly income of less than € 1,500, the proportion of non-populists is 43.7 percent and populists 24.9 percent.

Despite these continuing social divisions, it is important to note that the social divide in populism is clearly decreasing, primarily because populism has declined

FIGURE 9 Populism by educational attainment

As a percentage of the group



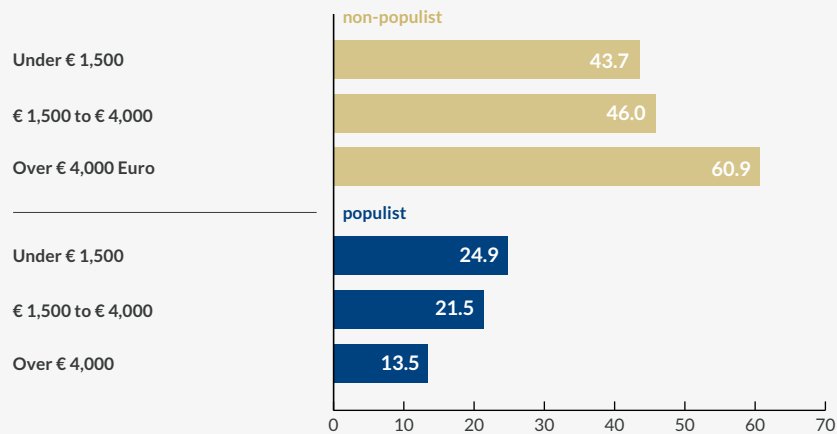
Target population: German population aged 18 and over in 2020 (sample size: 9,099).

Source: YouGov on behalf of the Bertelsmann Stiftung.

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FIGURE 10 Populism by income

As a percentage of the group



Target population: German population aged 18 and over in 2020 (sample size: 8,332).

Source: YouGov on behalf of the Bertelsmann Stiftung.

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more in the lower educational and income groups than in the uppermost groups, compared with 2017 and 2018. At the same time, the proportion of non-populist people in the lower educational and income groups has also risen more sharply than in the highest groups. Although the subgroups of the survey panels used in the Populism Barometer are not quite identical and thus not fully comparable, the trend remains very clear: the social divide in populism has not disappeared, but it is still much less pronounced than it was in the period of the 2017 federal elections. For the lower educational and economic groups, populist slogans have lost much

of their charm and mobilizing power, and no longer have the same binding force. In the 2021 federal elections, populists will at least have a harder time in these segments of the electorate than they did in the last election.

Non-voters remain more populist than voters

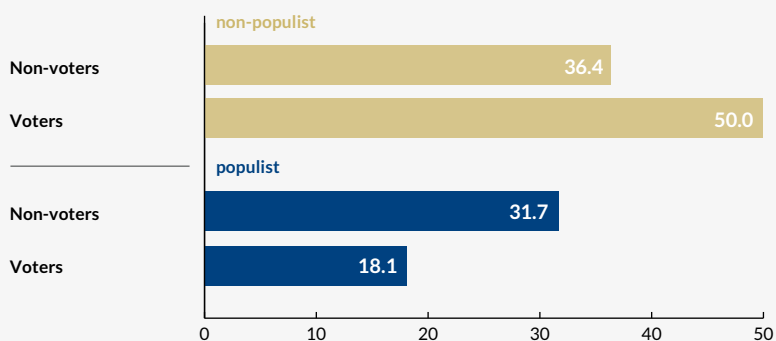
Abstention from voting is a pattern of reaction and behavior not untypical of populists. Abstaining “as a protest” can be a way for populists to distance themselves from the established institutions and procedures of liberal democracy, which they feel do not respect or represent them sufficiently. For this reason, non-voters are often more populist than the average active voter, regardless of their social profile and status. This effect is exacerbated significantly by the deep social divisions in voter turnout in Germany. Because non-voters in Germany are on average significantly more socially disadvantaged than voters, the social divide in populism also deepens the difference in populism between voters and non-voters.

In 2020, this has still not changed: non-voters remain significantly more populist than voters.

Among active voters, exactly half (50 percent) are non-populist and less than a fifth (18.1 percent) are populist. Among the non-voters, significantly more than a third (36.4 percent) are non-populist and slightly less than a third (31.7 percent) are populist. Compared to 2018, the proportion of populists among non-voters has thus decreased slightly less (-8.3 percentage points), while the proportion of non-populists has increased slightly less (+12.9 percentage points). Among voters, the proportion of populists decreased slightly more (-9.3 percentage points), while non-populists increased slightly more (+14.2 percentage points). Thus, the difference in populism between voters and non-voters has even increased slightly in 2020. But even among non-voters, populism is also declining very significantly. This means that a renewed populist mobilization of non-voters in the coming federal election campaign will probably be much more difficult than before the 2017 federal elections.

FIGURE 11 Populism among voters and non-voters

As a percentage of the group



Target population: German population aged 18 and over (sample size: 8,582).

Source: YouGov on behalf of the Bertelsmann Stiftung.

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Populists as “authoritarian democrats”

Populists like to see themselves as “disappointed democrats”, dissatisfied with the functioning of democracy, but not as “enemies of democracy” (Vehrkamp and Merkel 2018).

Does this self-perception have some truth in it?

First of all, the definition of populism already identifies populists as, at best, illiberal democrats. That is, their understanding of democracy does not, or only partially and inadequately, correspond to the norms and principles of a liberal democracy. Their typical contempt for democratic compromise, their anti-pluralism, their frequently open and aggressive exclusion of minorities, and their lack of respect for democratic institutions and procedures, show this all too clearly. Populists are not entirely democratic in the sense of liberal democracy. They mainly occupy the gray area between liberal and illiberal authoritarian democracy. This means that in fact – if this is not a contradiction in terms – they are illiberal, authoritarian democrats who hide their authoritarian attitudes and their rejection of central norms and institutions of democracy behind a supposed dissatisfaction with the functioning of democracy. They then position themselves as supporters of the democratic system who are nevertheless dissatisfied with its functioning. Behind their dissatisfaction with the functioning of democracy, however, there is often an authoritarian misunderstanding of liberal democracy. This is what ultimately makes populists so dangerous for democracy, because when they have the power to do so, they are capable of damaging democracy in illiberal, authoritarian ways, and even of deforming it beyond recognition.

It is precisely this picture which is also reflected in the Populism Barometer 2020: dissatisfaction with democracy against the background of an illiberal-authoritarian understanding of what democracy should be. Populists are illiberal, authoritarian democrats, and not, the most part, supporters of liberal democracy.

Here it is helpful to start by gaining a little more clarity about the populist understanding of democracy and then, against this background, to interpret the relatively high values of general agreement with democracy and the high levels of dissatisfaction with its functioning.

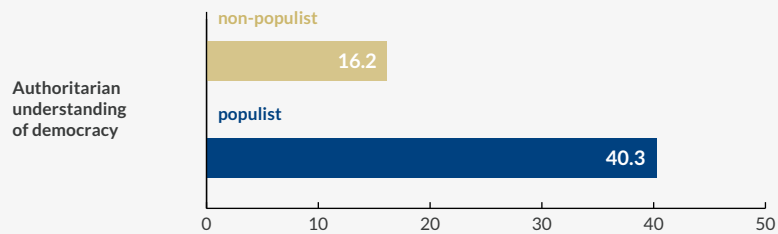
If one measures how strongly populists' understanding of democracy is influenced by typical authoritarian attitudes toward outsiders, minorities, rules and leadership compared with non-populists, very clear differences become apparent.

While only about one in seven non-populists (16.2 percent) adopts an authoritarian view of democracy, this figure is more than twice as high among populists, at 40.3 percent. Thus, about one in four populists tend towards an illiberal and authoritarian understanding of democracy (see the items for measuring an authoritarian understanding of democracy in the methodological appendix, p. 82).

This should be kept in mind when interpreting the fact that populists seem to show high levels of approval for democracy as a system, while at the same time demonstrating a significantly greater level of dissatisfaction with its functioning:

FIGURE 12 **Authoritarian democrats**

As a percentage of populism groups



Target population: German population aged 18 and over in 2020 (sample size: 8,369).

Source: YouGov on behalf of the Bertelsmann Stiftung.

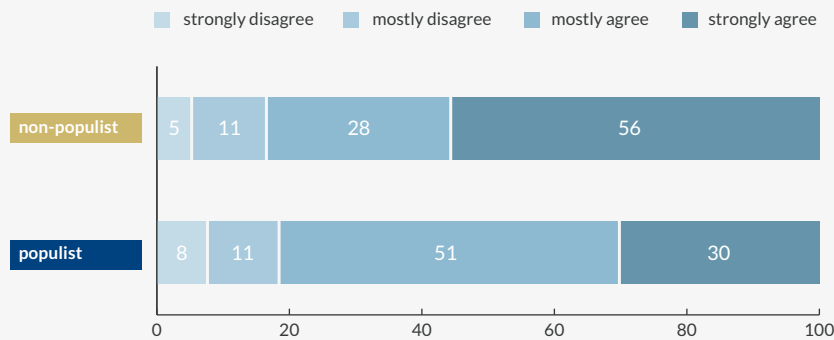
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It is true that 30 percent of all populists strongly agree with the statement, “All in all, democracy is the best political system”. However, firstly, this is only about half as many as among non-populists (56 percent). And secondly, for many of these populists it is their own subjective and rather illiberal, authoritarian understanding of democracy with which they are “strongly” agreeing. The same interpretative limitation applies when aggregating those who agree with the system of democracy either “strongly” or at least “mostly”. Here, the differences between populists and non-populists disappear almost completely at first glance due to the aggregation. More than eight out of ten non-populists (84 percent) and more than eight out of ten populists (81 percent) agree either “strongly” or “mostly”. However, the fact that the proportion of authoritarian democrats among populists is much more than twice as high shows how differently these formally very similar approval ratings should be evaluated normatively and in terms of democratic policy: while the vast majority of non-populists mean the system of liberal democracy when they agree with democracy as a system in general, many of the populists probably mean their illiberal, authoritarian understanding of democracy.

A nuanced interpretation is also necessary when it comes to satisfaction with the functioning of democracy. Here, populists show a significantly higher level of dissatisfaction than non-populists. A majority of populists (53 percent) are completely or at least somewhat dissatisfied, while only a quarter (25 percent) of non-populists are. But why are populists, who tend to have an illiberal, authoritarian understanding of democracy, dissatisfied with its functioning? Is it because democracy is too liberal, minority rights too strong and public opinion is too pluralistic? Their authoritarian understanding of democracy leaves room for this interpretation. At any rate, dissatisfaction with democracy, when expressed in abstract terms, cannot be interpreted meaningfully without such normative points of reference, and nor can approval of democracy as a system when expressed in the abstract without concrete references to the norms and procedures of liberal democracy. On the contrary, jumping to conclusions here would even lead to far-reaching misinterpretations. As illiberal, authoritarian democrats, populists cannot expect their approval for democracy or their satisfaction with democracy to be valued normatively in the same way as people with a liberal understanding of democracy. In research and analysis, too, such normative preconceptions should always be interrogated, in order to avoid misinterpretations.

FIGURE 13 Approval of democracy as best system ...

As a percentage of the group



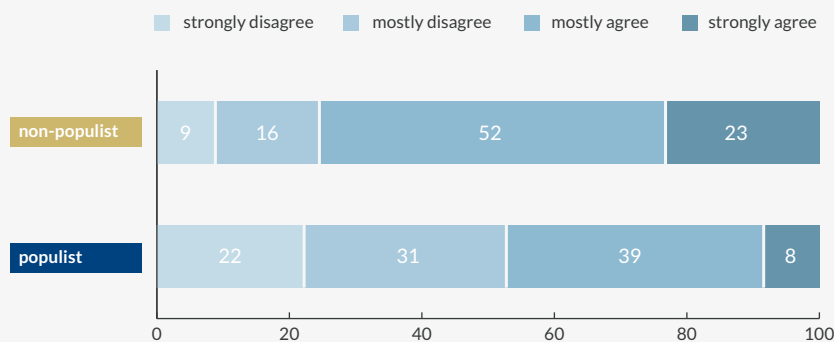
Target population: German population aged 18 and over in 2020 (sample size: 10,055).

Source: YouGov on behalf of the Bertelsmann Stiftung.

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FIGURE 14 Satisfaction with the functioning of democracy ...

As a percentage of the group



Target population: German population aged 18 and over in 2020 (sample size: 10,055).

Source: YouGov on behalf of the Bertelsmann Stiftung.

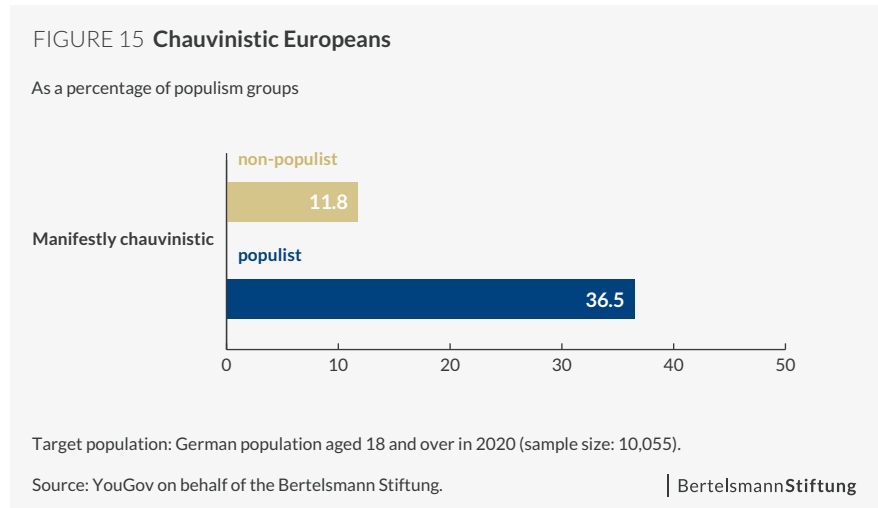
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Populists as “chauvinistic Europeans”

A similar picture emerges when it comes to approval for European integration and satisfaction with the level of integration achieved. Here, too, the question arises as to normative preconceptions about European integration: which Europe do people mean when they judge whether integration has gone too far? And which Europe do they mean when they express dissatisfaction with the functioning of European integration?

Here, too, great differences between populists and non-populists become apparent already in their preconceptions: how chauvinistic – that is, one-sidedly

nationalistic and fixated on whether national interests, national power and national prestige are asserted – are populists in comparison to non-populists when they express their opinions on European integration?

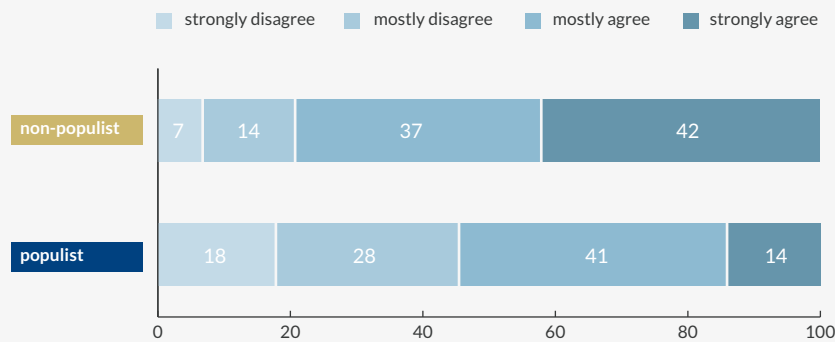


While only slightly more than one in ten non-populists (11.8 percent) adopt chauvinist attitudes, this figure is more than three times higher among populists (36.5 percent). More than one in three populists therefore demonstrates particularly strong chauvinism. But what kind of European considers asserting the power and prestige of one's own country to be the supreme goal of politics? What kind of Europe are voters with a populist and chauvinist attitude thinking of, when they wish that people would finally dare to show some strong national feeling and push German interests in a hard and energetic way?

At any rate, these preconceptions should be kept in mind when we interpret approval ratings for the EU and satisfaction with the functioning of European integration. When it comes to approval for Germany's membership in the European Union, it is noticeable that a majority of populists (55 percent) are at least mostly in agreement with it. Among non-populists, this figure is almost eight out of ten (79 percent), or more than three quarters. So a majority of populists also support membership in the European Union? But which Europe do they mean? A Europe of nationalists and chauvinists? At least that is what the answers to the question about the state of European integration suggest. Here it is very clear that three quarters of all populists (75 percent) believe that European integration has gone too far. Among non-populists, only just under three out of ten (29 percent) take this view. When asked about the extent and form of integration, the populists' chauvinist image of Europe breaks through. They mean a completely different, more nationalistic, more chauvinistic Europe than that of the European Union. This is what makes their majority support for membership in the European Union so unstable and suspicious. If they had a majority there, they would change Europe as we know it today, just as many populists would change, deform and distort liberal democracy as we know it, if they could.

FIGURE 16 Approval for membership in the European Union ...

As a percentage of the group



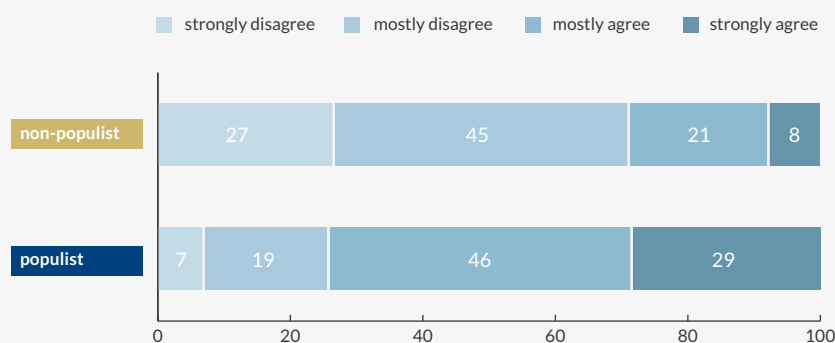
Target population: German population aged 18 and over in 2020 (sample size: 10,055).

Source: YouGov on behalf of the Bertelsmann Stiftung.

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FIGURE 17 European integration has gone too far ...

As a percentage of the group



Target population: German population aged 18 and over in 2020 (sample size: 10,055).

Source: YouGov on behalf of the Bertelsmann Stiftung.

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Is populism declining but becoming more radical?

How populist are Germans in the year before the 2021 federal elections?

First of all: Germans are substantially less populist than they were before the federal elections of 2017. After the political climate became heated following the migration crisis of 2015/16 and the “popular federal elections of 2017” (Vehrkamp and Wegschaider 2017), it has now cooled down significantly.

Although the populist wave has not yet completely ebbed, it has broken.

It had already passed its preliminary peak at the end of 2018. Since then, populism in Germany has been on the defensive. The reversal in the trend of public opinion was thus not triggered or primarily driven by the corona crisis. The tipping point for the political climate was already reached in the year before the crisis broke out. The turnaround was then stabilized and intensified by the “return of trust” in state government action in the course of the crisis management (Vehrkamp and Bischoff 2020b). It remains to be seen whether this will lead to lasting change and a sustainable (re-)stabilization of liberal democracy.

The upcoming election year 2021 will be the next important milestone.

Although this means that Germany is entering the election year 2021 with a significantly different political climate, populism remains an underlying presence: a renewed intensification of the wave as in 2016/17 cannot be ruled out. At the same time, a new challenge is emerging in the debate on populism: the threat that it will become radicalized in its increasingly small niche. It is true that significantly fewer people are populist. But the remaining populists seem to be becoming more radical. The first sign of this is the increasing overlap and fusion of populist views with right-wing extremist attitudes. This is especially true for the development of the AfD, which is evolving from what was once, in 2016/17, a quintessential right-wing populist mobilization movement, to a party whose voters are increasingly characterized by right-wing extremist attitudes (see “In Focus”, p. 18).

If this trend were to continue, the challenge would no longer be a political one within the framework of democratic anti-populism. It would then increasingly be a challenge for democracy to defend itself. However, for as long as possible and as long as this can be justified, the debate with populists belongs in the discursive arenas of liberal democracy, as the responsibility of democratic institutions themselves. Their power and capacity to assert themselves are far from exhausted. As the epitome of democracy, elections are the best chance to prove this.

2. The populism debate

Issues and positions driving populist and non-populist voter mobilization in 2020

What do voters care about in the year before the Bundestag elections 2021? Which topics motivate particularly strongly, and how much do populist and non-populist voters differ?

The issues with the strongest influence in Germany in 2020 are once again in the areas of “Europe”, “social affairs” and “migration”. The demand for “more direct democracy” is still the topic that can bridge the gap and reach populist and non-populist voters alike.

As in previous years, “Europe” remains a topic with positive associations for voters in Germany, which has a strong influence on their voting decisions. Compared with leaving the EU, the demand for greater cooperation would increase approval ratings by 15 percentage points. A significantly different picture emerges among voters with populist attitudes: they are largely indifferent to this question. The future of the EU does not appear to be a “hot topic” in this voter segment in the year before the 2021 federal elections. This is a strong indication that anti-EU campaigns currently have no appreciable chance of mobilizing people or gaining approval in Germany, even among populists.

Positions on migration and refugees dominated before and after the 2017 federal elections. This will remain the case this year, although to a much lesser extent, even among voters with populist attitudes. Migration and refugees remain crucial questions for them, but the effectiveness of the issue is also diminishing among populists. This reduces the chances of basing a populist election campaign exclusively on the possibility of mobilizing people through an anti-migrant position.

The problem of affordable housing and social justice in the housing market is still a pressing question, and has lost nothing of its urgency for voters in the run-up to the 2021 federal elections. It remains a “burning issue”. In some voter segments now has a similarly strong effect as the migration issue.

Less relevant topics which mainly meet with indifference from voters seem to be the issues of globalization, free trade and customs duties. These have lost support and are currently hardly likely to draw voters’ enthusiasm. Coronavirus and its worldwide consequences have dampened enthusiasm for more globalization and free trade in Germany too.

IN FOCUS

“More direct democracy” as an opportunity for mobilization

The demand for more referendums and “more direct democracy” is a constant feature of German election campaigns. This applies to the federal level as well as to the states and municipalities. But for federal election campaigns, the issue is of particular importance, if only because there are no directly democratic processes at a federal level in Germany so far. It is true that Article 20 of the German Basic Law expressly states that “all state power emanates from the people” and that this power is exercised “by the people in elections and votes”. However, the idea of introducing processes of direct democracy has so far never been able to gain majority support in the German Bundestag.

Nevertheless, the experimental results of the Populism Barometer 2020 show once again that “more direct democracy” is a topic with the potential to win approval and mobilize voters across all party lines. Candidates who advocate “many more referendums” during the election campaign are in parts significantly more popular than candidates who advocate “far fewer referendums”. It is particularly noteworthy that this applies to both populist and non-populist voters, and also to the voter segments of all parties represented in the Bundestag.

The figures in detail: on average across all voters, candidates can increase their approval ratings by twelve percentage points if they advocate “more direct democracy”. Among populist voters, the effect is as much as 20 percentage points, but even for non-populist voters, it is still clearly positive, at seven percentage points. This shows first of all that the demand for “more direct democracy” should not be left to the populists. Even among non-populist or only partially populist voters, it can be used to mobilize additional votes.

“More direct democracy” mobilizes voters from all parties

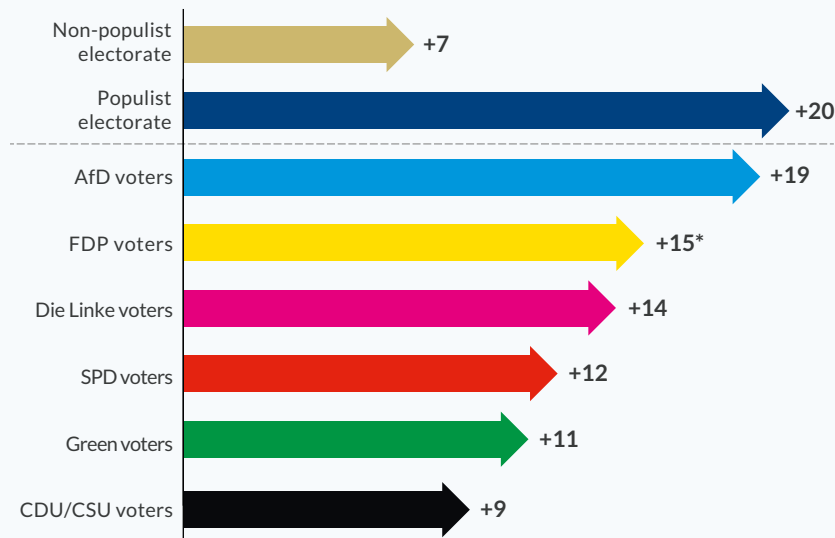
The very broad voter approval for direct democracy is also reflected in corresponding approval rates among voters of individual parties. With a range of nine to 19 percentage points, the values for the parties are all between the values for non-populists and populists and are at least just under a third higher than for non-populists. As expected, the effect is strongest among AfD voters, who display an above-average level of populism. In their case, a candidate could, by demanding “more direct democracy”, gain up to 19 percentage points (see Zaslove et al. 2020). For the FDP, the figure is 15 percentage points, but due to the comparatively small number of FDP voters in the survey experiment this is only of very limited significance. In contrast, the figures for voters of the Die Linke (+14 percentage points), the SPD (+12 percentage points), the Greens (+11 percentage points) and the CDU/CSU (+9 percentage points) are more meaningful.

It is true that this shows clear differences between the parties. Nevertheless, all parties can make use of the topic of “more direct democracy” to gain approval and mobilize voters. Thus, there is the largest possible coalition among voters for “more direct democracy”. This suggests that all parties could use this topic to gain support in the upcoming 2021 federal election campaign.

When it comes to populism and the ability of the established parties to react to it, this means that “more direct democracy” is an issue which bridges the gap – that is, a proposal with which the parties can address and mobilize both populists and non-populists.

“More direct democracy” as a new opportunity for mobilization

Rise in support for a candidate who supports “many more referendums”



Mobilization effect in percentage points compared to the basic position “Supports far fewer referendums”.

*Note: The statistical uncertainty of the effect for FDP voters is greater due to a smaller number of respondents.

Target population: German population aged 18 and over in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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If some tools of direct democracy were then introduced in a thoughtful way in order to supplement and improve representative processes at the federal level, this would also be a contribution to democratic anti-populism. It would prevent populists from casting doubt on representative institutions and procedures, accusing them of trying to evade the will of the people in between elections, particularly since gaps in representation are an important driver and reason for the emergence and activation of populist attitudes

(Rovira Kaltwasser et al. 2019). Even if it is true that populists often base their demand for “more direct democracy” on normatively precarious ideas and exaggerated populist criticism of representative democracy, the point still stands: for any candidate looking for a topic that can appeal to and mobilize both populists and non-populists in the German electorate, “more direct democracy” is the right choice, and this will remain the case in the upcoming federal election campaign in 2021.

Which topics and positions determine voting behavior?

So far, our analysis has shown: populist attitudes are still widespread among the German population in 2020, albeit at a noticeably lower level than in 2018. But are they also decisive when it comes to voting? The fact that someone takes a populist view of the functioning of politics and democracy does not automatically mean that their voting behavior will be determined by that. The path from individual political attitudes and preferences to a concrete choice at the ballot box is often long and winding. Someone may support the idea of protecting the environment, but might also think that leaving the EU is more important. Then that person would probably not vote for an environmentally friendly, but pro-European party at the polls, but rather for an anti-European party, even without agreeing with its environmental preferences.

It is therefore also important to ask when analyzing and interpreting populist attitudes: what influences populist and non-populist voters? Which topics and positions on single policy areas and problems are important to them, and how important are they? And what ultimately determines their decision at the polls? How much do populist attitudes shape voters' choices, how strong is their mobilizing power and which issues are particularly suited to a non-populist counter-mobilization?

In order to answer this question in the Populism Barometer, we will make use of a method known as conjoint analysis (Hainmueller et al. 2014/2015; Vehrkamp and Wratil 2017; Vehrkamp and Merkel 2018; Neuner and Wratil 2020). As a supplement to the conventional survey, conjoint analysis is particularly suited to discovering voting preferences and finding out which topic or which position on a certain issue has a particular influence on voting choices. There are limits to the usefulness of simple and direct questioning about topics and preferences in surveys. How distorted are the answers to direct questions? How much do respondents answer in a socially desirable way, how much are they prepared to reveal their "true" preferences and motives for their voting choices? And are respondents even able to perceive their own weighting and prioritization of competing topics and positions, and express them accurately in surveys?

In order to minimize such potential distortions, and to come as close as possible to the "true" motives of a voting decision, the conjoint analysis does not simply ask about these motives directly, but indirectly, by asking respondents to choose between different bundles or packages, in which various combinations of political positions on a range of themes are summarized. Respondents decide several times between political candidates who represent different bundles or packages of political positions. Since the packages are put together at random, and every respondent has to choose between them multiple times, the individual position which is decisive for voting can be identified. Using statistical procedures, it is then possible to find out indirectly which position on which topic actually determined a choice, without having to ask the respondent directly.

Which issues influence voters in 2020?

As in the Populism Barometer 2018, this method was used in the Populism Barometer 2020 to measure voters' preferences on eight different policy areas: Europe, the euro, refugees, housing, tax, free trade, protectionism and direct democracy.

For each of these eight policy areas, four different positions were formulated. The conjoint method then calculates the influence of a particular standpoint on the probability of a candidate gaining votes. How much an individual political statement influences a voting decision can be read from the percentage change in approval for a candidate in comparison with another who represents the "baseline position" on that topic.

For the issue of "Europe", for example, the baseline position was the call to leave the EU. The results below for the topic of Europe show the percentage points by which candidates can improve their results on average, by opting not to leave Europe but only to work together less closely within the EU, or by calling for stronger cooperation, or for the expansion of the EU into a common state.

The results for all eligible voters are summarized in Figure 18. In addition, Figure 19 gives an overview of the results for populist voters compared with non-populist voters.

The positive and negative effects of individual positions on voter decisions are shown by the distance of the dots from the dashed line (which represents zero). The scores on the scale each show how much a particular standpoint would change the approval rates of a candidate on average across the voter group being analyzed. A score of 20, for instance, means that candidates could raise their approval rate by 20 percentage points if, rather than advocating the relevant baseline position, they adopted the standpoint which deviates from that position.

So that the results of the analysis can be interpreted more precisely, the figures also show, in addition to the scores, horizontal lines which represent the confidence intervals in each case. These confidence intervals illustrate the uncertainty which accompanies all measurements made from surveys. The further the lines extend to either side, the more uncertain the score. Furthermore, only when the lines do not cross the zero line can we say with a high degree of certainty that the change in approval rates which has been measured does actually exist and is not a coincidence. The same goes for comparisons between individual standpoints: the more the lines of the confidence intervals overlap, the more likely it is that the differences measured could be a coincidence.

FIGURE 18 **The influence of positions and priorities on individual issues on the probability of candidate selection across the electorate**

In percentage points

POSITION ON THE EU

(Baseline = Supports the withdrawal of Germany from the European Union)

- Supports the development of the European Union into a common state
- Supports stronger cooperation within the European Union
- Supports weaker cooperation within the European Union

POSITION ON TAXES

(Baseline = Supports much lower taxes on the rich)

- Supports much higher taxes on the rich
- Supports somewhat higher taxes on the rich
- Supports somewhat lower taxes on the rich

POSITION ON REFUGEES

(Baseline = Supports the deportation of a great many refugees)

- Supports the admission of a great many new refugees
- Supports the admission of some new refugees
- Supports the deportation of some refugees

POSITION ON FREE TRADE AND GLOBALIZATION

(Baseline = Supports much less free trade and globalization)

- Supports much more free trade and globalization
- Supports somewhat more free trade and globalization
- Supports somewhat less free trade and globalization

POSITION ON THE EURO

(Baseline = Supports a much lower level of economic cooperation within the eurozone)

- Supports a lower level of economic cooperation within the eurozone
- Supports a higher level of economic cooperation within the eurozone
- Supports a much higher level of economic cooperation within the eurozone

POSITION ON SOCIAL HOUSING

(Baseline = Supports much lower investments in social housing)

- Supports greater investment in social housing
- Supports lower investment in social housing
- Supports much greater investment in social housing

POSITION ON PROTECTIONISM

(Baseline = Supports much higher duties on foreign goods and services)

- Supports higher duties on foreign goods and services
- Supports lower duties on foreign goods and services
- Supports much lower duties on foreign goods and services

POSITION ON DIRECT DEMOCRACY

(Baseline = Supports far more referendums)

- Supports more referendums
- Supports fewer referendums
- Supports far fewer referendums



Method: "Average marginal component effects" (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; changes in probability refer to comparison with the baseline category. Target population: German population aged 18 and over in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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When interpreting the results, it is also necessary to be aware of the fact that there are always only two candidates to choose from, without any indication of which parties those candidates belong to. This isolates the effects of the positions from the influence of voters' general identifications and aversions to particular parties and focuses on the potential influence of concrete positions on voter decisions.

FIGURE 19 The influence of positions and priorities on individual issues on the probability of candidate selection among non-populist and populist voters

In percentage points

POSITION ON THE EU

(Baseline = Supports the withdrawal of Germany from the European Union)

- Supports the development of the European Union into a common state
- Supports stronger cooperation within the European Union
- Supports weaker cooperation within the European Union

POSITION ON TAXES

(Baseline = Supports much lower taxes on the rich)

- Supports much higher taxes on the rich
- Supports somewhat higher taxes on the rich
- Supports somewhat lower taxes on the rich

POSITION ON REFUGEES

(Baseline = Supports the deportation of a great many refugees)

- Supports the admission of a great many new refugees
- Supports the admission of some new refugees
- Supports the deportation of some refugees

POSITION ON FREE TRADE AND GLOBALIZATION

(Baseline = Supports much less free trade and globalization)

- Supports much more free trade and globalization
- Supports somewhat more free trade and globalization
- Supports somewhat less free trade and globalization

POSITION ON THE EURO

(Baseline = Supports a much lower level of economic cooperation within the eurozone)

- Supports a lower level of economic cooperation within the eurozone
- Supports a higher level of economic cooperation within the eurozone
- Supports a much higher level of economic cooperation within the eurozone

POSITION ON SOCIAL HOUSING

(Baseline = Supports much lower investments in social housing)

- Supports greater investment in social housing
- Supports lower investment in social housing
- Supports much greater investment in social housing

POSITION ON PROTECTIONISM

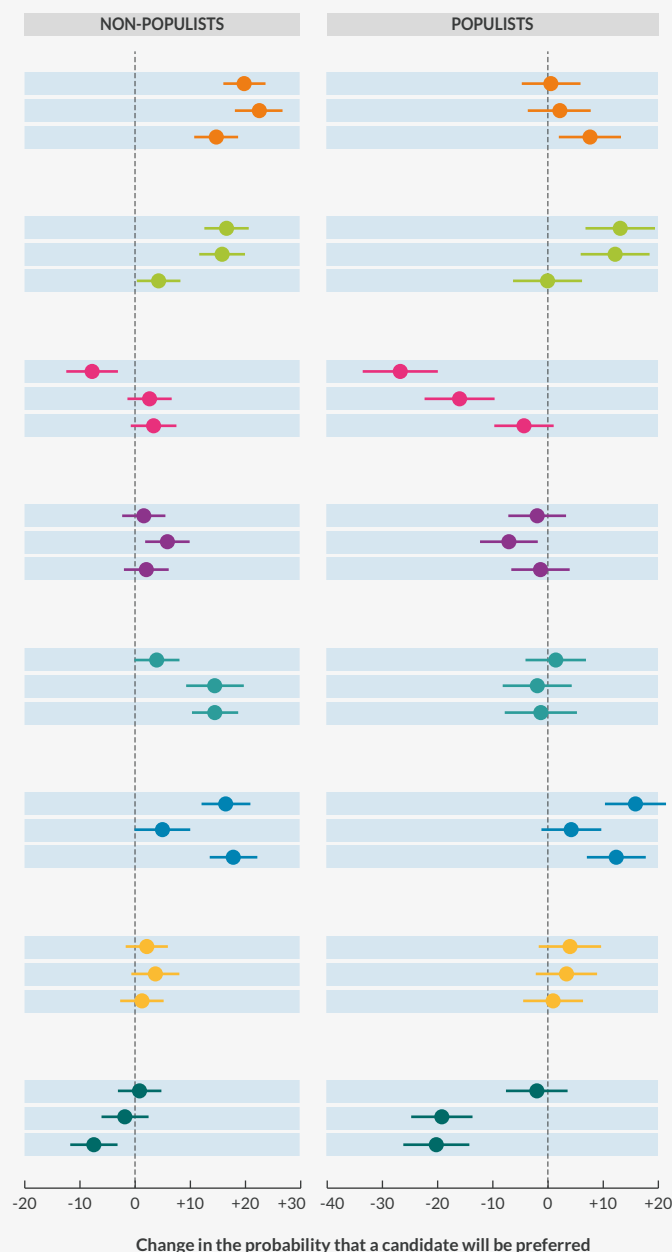
(Baseline = Supports much higher duties on foreign goods and services)

- Supports higher duties on foreign goods and services
- Supports lower duties on foreign goods and services
- Supports much lower duties on foreign goods and services

POSITION ON DIRECT DEMOCRACY

(Baseline = Supports far more referendums)

- Supports more referendums
- Supports fewer referendums
- Supports far fewer referendums



Method: "Average marginal component effects" (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; changes in probability refer to comparison with the baseline category.
Target population: German population aged 18 and over in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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The following section will start with eight individual analyses of the eight political areas discussed in the 2020 Populism Barometer, in each case looking at the average across the electorate and comparing it with the two camps of populist and non-populist voters. This results in a nuanced picture of the issues which influence voters in 2020 and allows us to discover which topics politicians and parties could pick up on in which ways, in order to raise their approval rates.

The future of the EU: “more Europe” mobilizes voters I

As in previous years, Europe remains a positive topic for voters in Germany, with a strong effect on their voting decisions. In the year before the next federal election in 2021, the future of European integration continues to influence many voters. Candidates who support the expansion of the European Union (EU) and greater cooperation within the EU during the election campaign are thus gaining a lot of support and significantly increasing their likelihood of being elected. Conversely, for EU skeptics and opponents of increasing European integration, this means that an anti-EU election campaign significantly worsens their chances of being elected on average across the electorate. An anti-EU campaign would therefore be at best a niche strategy from the outset, with which only isolated segments of the electorate could be reached. On average for all eligible voters, it would meet with high levels of rejection and resistance.

For pro-Europeans, this means that “more Europe” increases the chances of being elected in the run-up to the 2021 elections to the Bundestag, and in two ways at once: on the one hand, as a positive topic in the election campaign, with which there is a chance of mobilizing the great majority of pro-European voters and winning their approval, but also as a chance for “negative campaigning” against skeptics and opponents of the EU. Anyone who advocates leaving the EU, or who would at least accept, provoke or risk doing so through their policies, must expect clear resistance from the German electorate. A party that fundamentally questioned or even endangered the existing EU with its European policy positions would feel the effects of this resistance.

So “more Europe” remains a real mobilization opportunity for voters in Germany. Conversely, for many German voters the threat of leaving the EU remains a specter with a strong counter-mobilizing effect. In the run-up to the 2021 elections to the Bundestag, pro-Europeans have a double opportunity: on the one hand, to win the support of the pro-European majority of German voters through a pro-EU election campaign, and on the other, to profit from voters’ counter-mobilization against the anti-European minority, especially among populists. Appealing to pro-European convictions is potentially just as successful as appealing to voters’ concerns about the detrimental effects of anti-European positions.

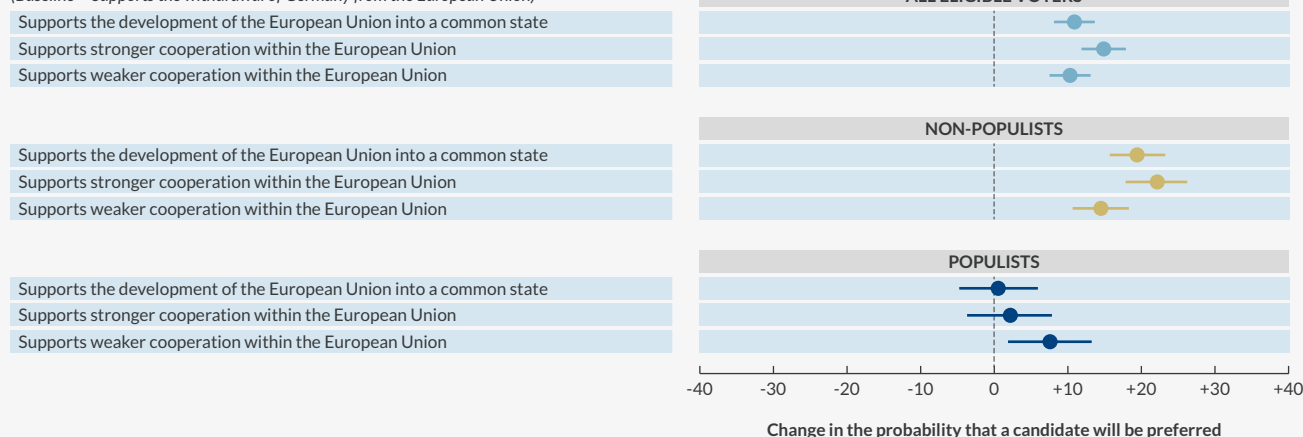
In terms of numbers, these tendencies are also evident this year, both among all voters and even with renewed strength among non-populist voters. It is true that the effect of pro-European positions is slightly muted compared to previous years. However, the differences are mainly in the section of statistical uncertainty. They can therefore be regarded as negligible when interpreting the results. Compared to withdrawal from the EU, the demand for stronger cooperation would increase approval ratings by 15 percentage points. The expansion of the EU into a common state (+11 percentage points) and even the demand for somewhat weaker cooperation in the EU (+10 percentage points) are strongly preferred to leaving the EU. This again shows the particularly strong chances of mobilization against candidates who would demand a withdrawal from the EU or who would provoke or risk it with anti-EU positions. Pro-European candidates for parties with very non-populist voters have a particular opportunity here (see Chapter 3).

FIGURE 20 The influence of positions and priorities on the EU on the probability of candidate selection across the electorate and among non-populist and populist voters

In percentage points

POSITION ON THE EU

(Baseline = Supports the withdrawal of Germany from the European Union)



Method: "Average marginal component effects" (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; changes in probability refer to comparison with the baseline category. Target population: German population in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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A significantly different picture emerges for populist voters:

They are largely indifferent to the issue of the EU. In this voter segment, the future of the EU currently does not appear to be a "hot topic" with a high chance of mobilization. At any rate, for populists, the question of whether a candidate will argue for or against the EU is currently not decisive for the election. Even candidates who advocate expanding the EU into a common state would on average not significantly worsen their electoral chances compared to candidates advocating leaving the EU. This is a strong indication that anti-EU campaigners have no significant chances of mobilization and approval even among German populists. At the same time, however, they make great losses on average across all voters and among non-populists, where they provoke a sharp drop in approval.

All this once again underlines the overall tenor: "More Europe" offers both positive and negative opportunities for mobilization. On average across all voters, and especially among non-populist voters, appealing to pro-European stances has a mobilizing effect without deterring populist voters from the outset. At the same time, when candidates distance themselves from skeptics and opponents of the EU, this has a similar mobilizing effect. There are therefore two potential opportunities here that were not sufficiently exploited in the 2017 federal election campaign. In the run-up to the 2021 federal elections, the parties have this chance once again.

The future of the eurozone: “more Europe” mobilizes voters II

A very similar pattern to that of the EU as a whole is evident on the question of the future of the eurozone. Here, too, on the issue of the euro, an explicitly pro-European election campaign has comparable potential to mobilize voters and gain approval. Once again, this applies both to the average of all voters and, to a somewhat greater extent, to voters with non-populist attitudes. Like the EU, the euro has retained almost the same mobilization effect as in previous years. At any rate, the differences are too small to draw any statistical conclusions. Compared with calling for a “much lower” level of cooperation between the euro countries, the call for a “much higher” level of cooperation again increases approval rates among all voters very significantly this year (+9 percentage points). Among voters with a non-populist attitude, approval increases even more, by 14 percentage points.

Only the populists once again appear indifferent. Whether a candidate asks for a “lower”, “higher” or even “much higher” level of cooperation between the euro countries has no statistically measurable effect on their probability of choosing that candidate, and seems to be irrelevant, at least for voting choices. In any case, it leaves their approval ratings for such candidates largely untouched.

This is especially remarkable because in recent years, the established parties have been increasingly fearful and anxious about an anti-European backlash from populists against explicitly pro-EU and pro-euro positions. We often hear the argument that an explicitly pro-European election campaign harbors the potential for populist mobilization. Thus, campaigners have often been too afraid of their

FIGURE 21 The influence of positions and priorities on the eurozone on the probability of candidate selection across the electorate and among non-populist and populist voters

In percentage points

POSITION ON THE EURO

(Baseline = Supports a much lower level of economic cooperation within the eurozone)

Supports a lower level of economic cooperation within the eurozone

Supports a higher level of economic cooperation within the eurozone

Supports a much higher level of economic cooperation within the eurozone

Supports a lower level of economic cooperation within the eurozone

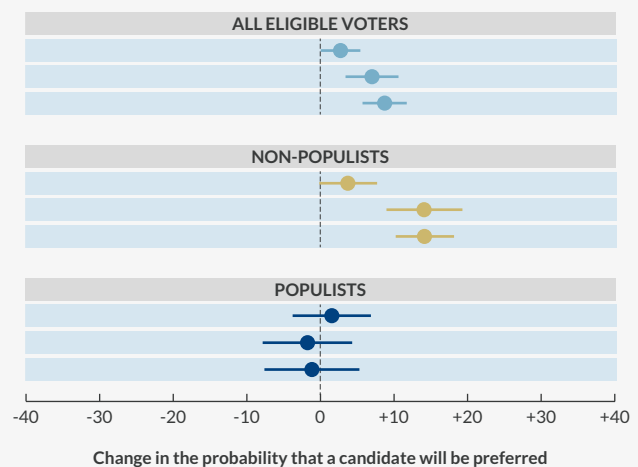
Supports a higher level of economic cooperation within the eurozone

Supports a much higher level of economic cooperation within the eurozone

Supports a lower level of economic cooperation within the eurozone

Supports a higher level of economic cooperation within the eurozone

Supports a much higher level of economic cooperation within the eurozone



Method: “Average marginal component effects” (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; changes in probability refer to comparison with the baseline category.
Target population: German population aged 18 and over in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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own European courage to make “more Europe” an essential part of their campaign, especially in the run-up to the 2017 federal elections. The findings of the Populism Barometer 2020 once again show how much potential has remained untapped as a result – potential both to mobilize people and to shift approval ratings positively and negatively.

It will therefore be interesting to see whether the established pro-European parties will change their approach in the 2021 federal election campaign. Will they take advantage of these opportunities this time? That would require much stronger “positive campaigning” for “more Europe” and also “more euro”. At the same time, we would also recommend that they distance themselves much more clearly from opponents of the EU and the euro, and become more courageous in engaging in “negative campaigning” against them. The 2021 election manifestos have not yet been written. So there is still time to exploit this potential and to seize the opportunities offered by “more EU” and “more euro” in the 2021 federal elections.

The migration issue is currently less decisive for elections

Before and after the federal elections in 2017, positions on migration and refugees dominated. Especially for the populists among Germany’s voters, they had the strongest positive and negative effects on a candidate’s approval ratings and probability of being elected. This will continue to be the case this year, though to a much lesser extent, even among voters with populist attitudes. Migration and refugees remain crucial issues for them. But the impact of the issue is diminishing even among populists. It remains on the populist agenda, but is now somewhat more muted than it was in the 2017 federal elections. This may reduce the chances of basing a populist election campaign solely on the chances of mobilizing voters with anti-migration positions. In any case, simply expressing hostility towards migrants is somewhat less likely to have a strong effect than in the 2017 federal elections. The issue has lost some of its urgency, even among populists.

Nevertheless, populist voters still give 27 percentage points more support to the idea of deporting “a great many” refugees than to accepting “a great many” refugees. In the year before the federal elections in 2017, this effect was 29 percentage points. Still, populists no longer seem to have such a burning sense of urgency when it comes to deportations. Candidates only wishing to deport “some” refugees no longer have to fear losing support among populists by not calling for the deportation of “a great many”. At any rate, the effect is statistically less clear than in the year of the 2017 federal elections, which could be interpreted cautiously as a sign of a slight decline in virulence and urgency. However, this does not change the fact that populists are markedly hostile towards migrants.

There are also initial signs that migration and refugee policy is losing its urgency when we look at the average across the electorate and at non-populist voters. At least, compared with calls to deport “a great many” refugees, the only way that candidates can lose support in a statistically striking way is by refusing to admit “a great many” refugees. Otherwise, many voters, and especially those who are not populist in their attitudes, are rather indifferent to the various positions on migration policy. This can be interpreted as a sign of a slight decline in the salience

FIGURE 22 The influence of positions and priorities on refugees on the probability of candidate selection across the electorate and among non-populist and populist voters

In percentage points

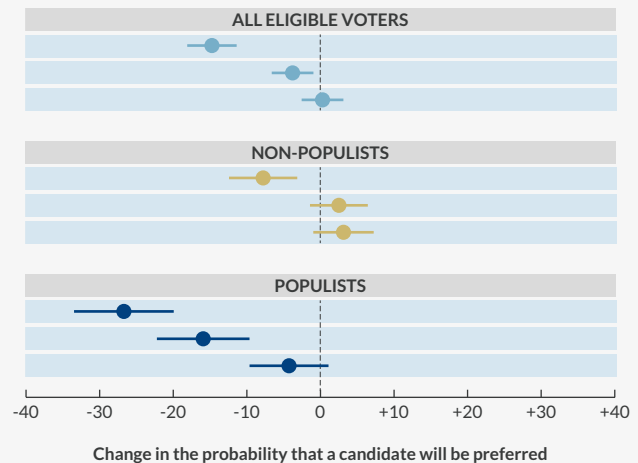
POSITION ON REFUGEES

(Baseline = Supports the deportation of a great many refugees)

Supports the admission of a great many new refugees
Supports the admission of some new refugees
Supports the deportation of some refugees

Supports the admission of a great many new refugees
Supports the admission of some new refugees
Supports the deportation of some refugees

Supports the admission of a great many new refugees
Supports the admission of some new refugees
Supports the deportation of some refugees



Method: "Average marginal component effects" (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; changes in probability refer to comparison with the baseline category.
Target population: German population aged 18 and over in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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and urgency of these questions among these voters, too. This in no way means that this topic is closed and no longer needs dealing with in the upcoming election campaign of 2021. It still dominates, especially since it is always possible that new crises and challenges will arise in this area in the period leading up to the next federal elections in 2021.

Social housing: the new social question remains a pressing issue

Some problems may solve themselves. The problem of affordable housing and social justice in the housing market is not one of them. It remains a pressing issue which has lost none of its urgency for voters. Consequently, it is still a "hot topic". In some segments of the electorate, it has a similarly strong influence to the migration question. So social housing can be used to make election campaigns more or less successful. At least, it has a clear and noticeable effect on candidates' approval rates and probability of being elected: an opportunity and a risk for those who continue to ignore the issue.

First, the numbers: compared to the demand for "much lower" investment in social housing, calling for "greater" and "much greater" investment can improve approval rates by 16 and 15 percentage points respectively. What is particularly striking and remarkable about this is that the effect is almost identical in terms of direction and strength for populists and non-populists. Voters with populist attitudes do not react differently on social housing than non-populist voters, in

terms of their approval rates. They therefore “tick” much the same on issues of social housing.

This presents a unique opportunity for the established parties. Social housing is an issue that could appeal to and mobilize populists and non-populists alike. On average across all voters, it raises concern and influences their choices at the ballot box. Arguing for more investment in social housing increases the likelihood of winning votes in both segments of the electorate, among populists and non-populists. For candidates from established parties, it therefore lends itself to those attempting to win back populist votes. It can also be used to mobilize non-voters, because non-voters are on average more populist than voters (see Chapter 1).

All this also applies to the possible counter-mobilization of voters against a further reduction in investment in social housing. Calling for such a reduction would considerably worsen the electoral chances of candidates among both populists and non-populists, whether the call is for “much lower” or merely for “lower” investment. So here, too, there is a chance of “negative campaigning” against a further reduction in investment in social housing. If the established parties ignore the issue, they will leave themselves open to attacks from populists. So far, however, the AfD has tended to leave this issue to Die Linke. The AfD continues to be shaped by programmatic tendencies from its founding years as a party of anti-EU and anti-euro professors. The topic therefore offers great opportunities for the parties to the left of the center to raise their profile, especially among non-voters and those with a more populist attitude.

FIGURE 23 The influence of positions and priorities on social housing on the probability of candidate selection across the electorate and among non-populist and populist voters

In percentage points

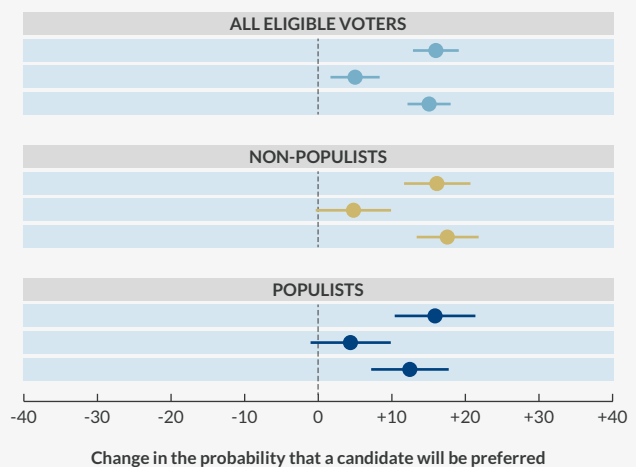
POSITION ON SOCIAL HOUSING

(Baseline = Supports much lower investment in social housing)

Supports greater investment in social housing
Supports lower investment in social housing
Supports much greater investment in social housing

Supports greater investment in social housing
Supports lower investment in social housing
Supports much greater investment in social housing

Supports greater investment in social housing
Supports lower investment in social housing
Supports much greater investment in social housing



Method: “Average marginal component effects” (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; changes in probability refer to comparison with the baseline category. Target population: German population aged 18 and over in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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Taxes: the continued wish for more redistribution

Meanwhile, the picture is somewhat different for taxes and the desire for more redistribution through higher taxes on the rich. Here, too, the figures remain surprisingly stable, in terms of the direction and strength of the influence which this topic has on a candidate's chances. Nevertheless, in the populist segment, the desire for more redistribution through higher taxes on the rich has become somewhat less urgent this year.

For example, the demand for "somewhat higher" taxes on the rich still increases approval among populists by about twelve percentage points. In the 2017 Populism Barometer, however, this effect was still more than 20 percentage points. At that time, the difference between "much lower" and "somewhat lower" taxes on the rich was already enough to win significantly more approval among populists. At present, it appears that such a position has hardly any effect on the approval of populist voters for a candidate.

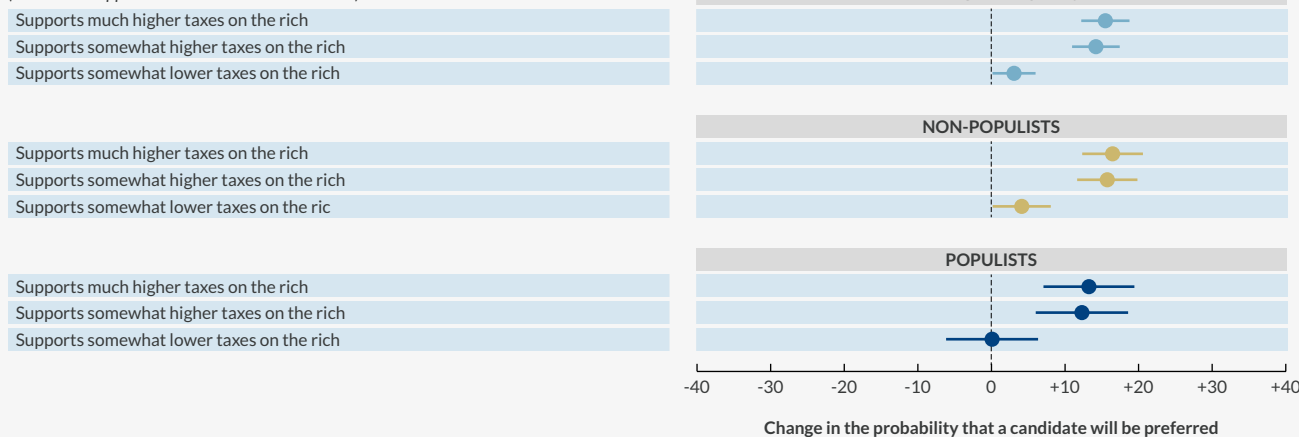
However, these changes are not particularly pronounced. Nor do they fundamentally change the fact that populists and non-populists want more redistribution through higher taxes on the rich. In this respect, this topic still continues to present similar opportunities for mobilization as that of social housing. Nevertheless, the desire for more redistribution through higher taxes for the rich shows a slightly weaker sense of urgency among voters than before the 2017 federal elections. This could be due to the very generous and inclusive financing of the federal government's corona crisis packages, as well as the generally more socially inclusive government policy of the Grand Coalition since 2018/19. However, the successes

FIGURE 24 The influence of positions and priorities on taxes on the probability of candidate selection across the electorate and among non-populist and populist voters

In percentage points

POSITION ON TAXES

(Baseline = Supports much lower taxes on the rich)



Method: "Average marginal component effects" (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; changes in probability refer to comparison with the baseline category. Target population: German population aged 18 and over in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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achieved here are still a long way from “completing” the task of redistribution. On the contrary: it remains a dominant topic and continues to raise concern among many voters. In the coming federal election campaign, redistribution therefore offers the established parties a range of topics for appealing to and mobilizing both non-populist and populist voters. Populist politicians could also exploit that same opportunity if the topic is left to them.

Free trade and globalization less decisive for elections

The demand for “somewhat more” or even “much more” free trade and globalization gained urgency in the year after the 2017 federal elections. The Populism Barometer 2018 showed that, at least on average across all voters, and to a greater extent for non-populists, candidates could gain approval through their position on free trade and globalization. The more they argued for “much more” or “somewhat more” free trade and globalization compared with “much less”, the more significantly their approval rate rose, especially among non-populists, where it increased by more than ten percentage points. Even among voters with populist attitudes, there was a preference for more free trade and globalization, albeit less pronounced. Thus, anti-globalization does not mobilize voters in Germany. This distinguishes Germany as an export nation from many other European countries where left- and right-wing populists can make political capital out of anti-globalization campaigns. This does not work in Germany.

And that remains so in the year before the 2021 federal elections: even for the populists among German voters, free trade and globalization are not a “hot topic”.

FIGURE 25 The influence of positions and priorities on free trade and globalization on the probability of candidate selection across the electorate and among non-populist and populist voters

In percentage points

POSITION ON FREE TRADE AND GLOBALIZATION
(Baseline = Supports much less free trade and globalization)

Supports much more free trade and globalization

Supports somewhat more free trade and globalization

Supports somewhat less free trade and globalization

Supports much more free trade and globalization

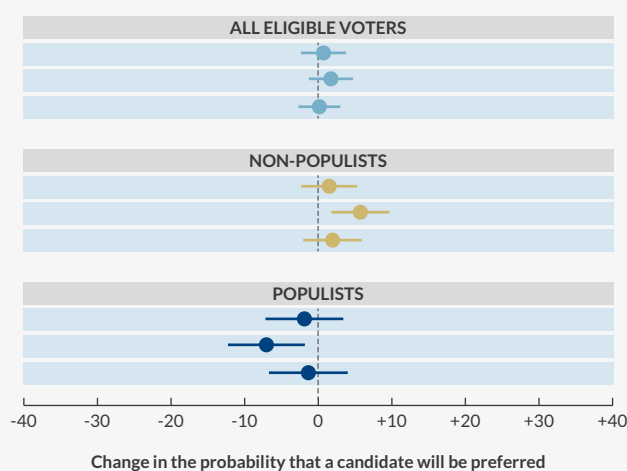
Supports somewhat more free trade and globalization

Supports somewhat less free trade and globalization

Supports much more free trade and globalization

Supports somewhat more free trade and globalization

Supports somewhat less free trade and globalization



Method: “Average marginal component effects” (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; changes in probability refer to comparison with the baseline category.
Target population: German population aged 18 and over in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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Whether a candidate stands for “much less”, “somewhat less” or “much more” free trade and globalization is largely irrelevant to them. At any rate, it does not influence their decision for or against a candidate.

This time, however, a similar picture of indifference emerges among non-populist voters and across the electorate: nobody seems to consider the topic crucial for voting choices. In 2018, things were still different. Calling for more free trade and globalization led to a gain in approval of up to ten percentage points on average for all voters, with higher approval rates among non-populists. In 2020, these effects have largely disappeared. These issues have lost their positive mobilization power. A corona effect could be hidden behind this, as many voters have become more aware of the negative consequences and risks of globalization as the pandemic has spread worldwide. However, this has not (yet) become a critique of globalization, and it remains to be seen whether the dampening of the globalization discourse will correct itself again after the crisis is overcome. At least, calling for more free trade and globalization does not currently generate additional support for candidates.

For the parties and their candidates in the run-up to the 2021 federal elections, this means that even in the context of the corona crisis, there is still “no need to fear talking about globalization”. Free trade and globalization do not (yet?) have any negative chances of mobilization in Germany, neither among the non-populists nor among the populists in the electorate. However, more free trade and globalization do not currently lend themselves to active mobilization. The negative consequences of the corona crisis, which has partly resulted from globalization, can be felt worldwide, and are probably still too present and too threatening.

Customs duties and protectionism also less decisive for elections

The picture is very similar and only slightly better when it comes to customs duties and protectionism. Here, too, there is a great deal of indifference among populist and non-populist voters. Only the somewhat more active positioning of the voters in between means that we can still observe a slightly positive effect on approval rates for lower duties or for somewhat lower increases in duties. Compared with “much higher” duties, the demand for only “higher”, “lower” or “much lower” duties results in higher approval rates by three to four percentage points. In the 2018 Populism Barometer 2018, however, these positive effects were even more pronounced and were also visible for all voter segments considered. The topic thus had an impact on both non-populists and populists. This is currently no longer the case.

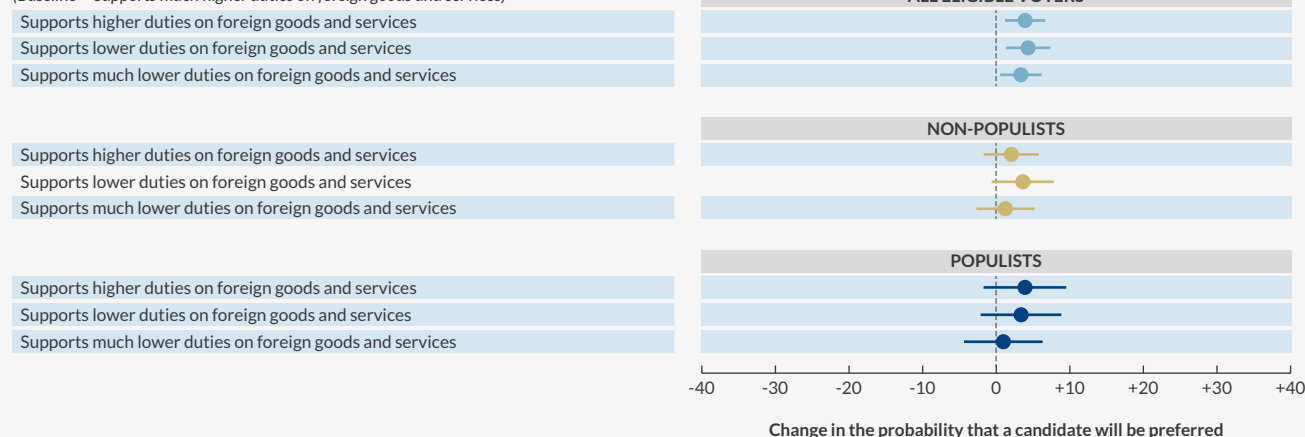
However, this indifference does not only mean that calling for lower duties and arguing against protectionism will not lead to higher approval rates. It also means that there are no significant negative effects on approval rates. Protectionism does not mobilize German voters either, and arguing for higher duties would not have any significant effect on a candidate’s ratings. Thus, duties and protectionism are currently not suitable for either positive or negative campaigns, because the topic does not really influence voters at present.

FIGURE 26 The influence of positions and priorities on protectionism on the probability of candidate selection across the electorate and among non-populist and populist voters

In percentage points

POSITION ON PROTECTIONISMS

(Baseline = Supports much higher duties on foreign goods and services)



Method: "Average marginal component effects" (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; changes in probability refer to comparison with the baseline category.
Target population: German population aged 18 and over in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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Direct democracy shouldn't be left to the populists!

The picture is almost unchanged when it comes to the demand for more direct democracy in Germany. "More direct democracy" mobilizes voters with populist attitudes. But it is also accepted, or at least not rejected, by non-populist voters and by the whole electorate. In contrast to populists, however, non-populist voters are not as strongly concerned with this issue. They would indeed take a negative view of it if a candidate explicitly called for "far fewer" referendums. Their approval ratings for candidates also increase with their commitment to more direct democracy. Nevertheless, the overall picture for all voters is still dominated by the much stronger wish for more direct democracy among voters with populist attitudes. Their approval ratings for candidates who advocate "less" or "much less" direct democracy drop by up to 20 percentage points. Among non-populist voters, this effect is much less pronounced, at seven percentage points.

For populist voters, the demand for direct democracy is part of their standard repertoire. However, their underlying democratic intentions remain suspect. Why?

Populists are more likely to represent an illiberal, authoritarian understanding of democracy than average voters. They reject political compromise as a betrayal of their own principles, as well as many of the fundamental norms and procedures of parliamentary liberal democracy (see Chapter 1). Moreover, they hold anti-pluralist views. They believe in the unity of a supposed popular will, which they believe they know and represent politically. This makes them, at least superficially, supporters of direct democracy, especially when, as in Germany at the federal level, such instruments do not exist or are used only very rarely and to a limited extent.

FIGURE 27 The influence of positions and priorities on direct democracy on the probability of candidate selection across the electorate and among non-populist and populist voters

In percentage points

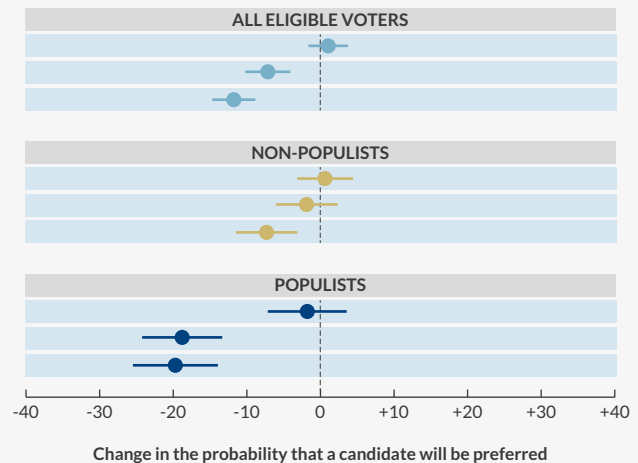
POSITION ON DIRECT DEMOCRACY

(Baseline = Supports far more referendums)

Supports more referendums
Supports fewer referendums
Supports far fewer referendums

Supports more referendums
Supports fewer referendums
Supports far fewer referendums

Supports more referendums
Supports fewer referendums
Supports far fewer referendums



Method: "Average marginal component effects" (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; changes in probability refer to comparison with the baseline category.
Target population: German population aged 18 and over in 2020.

Source: YouGov on behalf of the Bertelsmann Stiftung.

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The demand for more direct democracy then becomes an argument which can easily be used to mobilize voters against the established parties and against the parliamentary institutions of liberal democracy. "Look," this argument goes, "the people are not being allowed to have their say or to participate directly in deciding important issues, and the elites are using the procedures and institutions of representative democracy to assert their own interests, which are directed against the real people." These are the populist slogans for more direct democracy.

For populists, therefore, direct democracy is above all an instrument for establishing a supposedly homogeneous popular will vis-à-vis the ruling elites. However, this is based on a fundamental misunderstanding of how the various instruments of direct democracy work in a representative democracy and what they can achieve.

In the context of a liberal democracy, the real challenge and potential of direct democracy is not to replace, but rather to complement representative institutions and increase participation. The crucial justification for more direct democracy is then not the enforcement of a supposedly homogeneous popular will against the selfish class interests of a corrupt elite, but the participatory improvement of representative institutions within pluralistic-liberal democracy. It is then much more complex to determine which processes of direct democracy are suitable for which institutional variants of representative liberal democracies in practice. This question certainly cannot be answered with recourse to a supposedly homogeneous popular will.

This misunderstanding of the possibilities and opportunities presented by direct democracy in representative democracies often means that populists rapidly become disappointed with direct democracy when they do come to power in democracies, and they soon come to neglect its tools. They realize very quickly that direct democracy does not produce homogeneity but plurality, and that the supposed will of the people is often more diverse, heterogeneous and unpredictable than in the populist imagination.

Therefore, populists' approval for direct democracy remains precarious when viewed in normative terms. The task of the established parties would then be precisely to ensure that they do not hand over the real potential of direct-democratic instruments to populist distortion. They should therefore insist on a nuanced discussion of the advantages and disadvantages of directly democratic elements within representative democracy, and use their pluralistic and liberal democratic potential. In doing so, supporters of direct democracy could also rely, at least, on the benevolent acceptance and support of non-populist voters. But the fact that direct democracy seems to have overwhelmingly high levels of support in simple surveys should not obscure the fact that the issue cannot have a substantial influence on voting decisions beyond the more populist voters.

That, at least, is what the results of this year's Populism Barometer 2020 show: direct democracy is not a mobilization hit for non-populists. Nevertheless, it should not be left to populists alone. Properly understood, it can even enable the established parties to bridge the gap to the populists' voter segments. The introduction of elements of direct democracy could build on a consensus between non-populists and populists, especially at the federal level: an opportunity to make peace and bring new developments that democracy in Germany should not miss.

3. Populism at the ballot box

Party preferences and voting intentions of the populist and non-populist electorate in 2020

Populist and non-populist voters sympathize and identify with the parties in very different ways, and they also vote very differently. Compared with the 2017 federal elections, however, significant changes can be observed. The turnaround in the climate of opinion is also influencing voters' motives for voting and the parties' chances of winning.

This can also be seen from our analysis of voting intentions in the political center. The temptation of the center-right parties to follow the populism of the AfD, to imitate it or at least rhetorically adapt to it, has been recognized as a wrong turn and corrected. The three center-right parties (CDU/CSU and FDP) are thus once again firmly anchored in the non-populist voter segment slightly to the right of the political center.

The overall picture of all parties shows, for the first time since 2017, a bloc with a distinctly below-average level of populism including all five parties slightly to the left and right of the political center (CDU/CSU, the Greens, SPD and FDP). This non-populist bloc of established parties in the political center currently represents slightly more than 80 percent of all voters. The populism of the political margins is also much less pronounced than in 2017/18.

Thus, it seems that the party landscape in Germany is significantly more resistant to populism in the year before the 2021 federal elections than it was before and after the 2017 elections.

The AfD remains an extreme outlier in the German party landscape in 2020. A clear majority (56 percent) of all AfD voters hold either latent right-wing extremist attitudes (27 percent) or even manifest right-wing extremist attitudes (29 percent). At the same time, 73 percent of all AfD voters either clearly have populist attitudes (38 percent) or are at least partly populist (35 percent). Among AfD voters, the proportion of those who are non-populist and not right-wing extremist is only 13 percent. Nearly nine out of ten AfD voters (87 percent) thus either very clearly or at least latently represent populist and/or latently right-wing extremist attitudes.

In summary, this shows that not only as a right-wing populist mobilization movement, but also as a party whose voters are characterized by at least latently right-wing extremist attitudes, the AfD has a unique selling point: the more populism wanes and populist voters from the center return to the established parties, the more dominant right-wing extremist attitudes are becoming among AfD voters.

IN FOCUS

Better a negative party identity than none at all

In recent years, the importance of negative party identities for electoral behavior has been rediscovered (Meléndez and Rovira Kaltwasser 2017; Vehrkamp and Bischoff 2020a). Voters do not only opt *for* parties, but also *against* them. Thus, they do not vote *for* a party only because it best suits their interests, attitudes and preferences. They also vote *against* one or more parties which they are determined to stop, by giving their vote to the party that they feel is the best insurance against one of these parties gaining too much influence or even coming to power.

Negative party identities can therefore also influence voting decisions. This makes it worthwhile for the parties to pay attention to them: how many voters are determined to avoid a particular party, and which voters are these? Where would

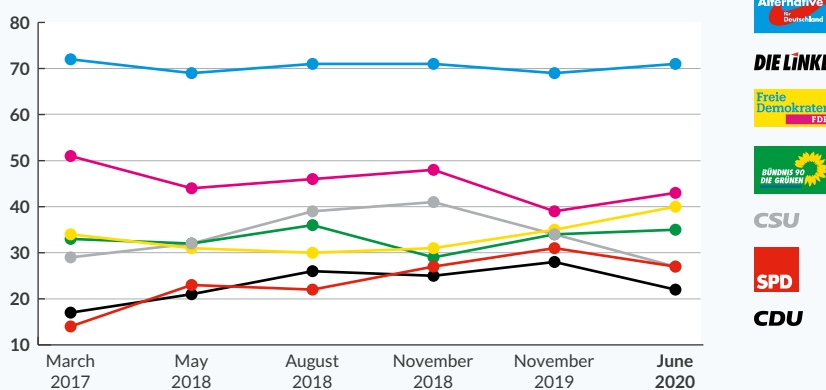
it be worth drawing a clear line, competing and fighting with another party in order to secure electoral success?

When it comes to measuring negative party identities, various approaches exist. One possibility for operationalizing negative party identities is to ask respondents their opinion of a party: “very high”, “quite high”, “quite low” or “very low”. Those who have a “very low” opinion of a party will be very unlikely to vote for it. Therefore, it is highly probable that a negative party identity can be assumed if a respondent has a “very low” opinion of a party.

Over the period from March 2017 to June 2020, the following picture emerges for the parties represented in the German Bundestag:

Negative party identities over time

As a percentage of all respondents



Note: Percentage of respondents who stated that they had a “very low” opinion of a particular party. Target population: German population aged 18 and over (sample size 2020: 10,055).

Source: infratest dimap and YouGov on behalf of the Bertelsmann Stiftung.

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The percentage of voters with a “very low” opinion of a party generally ranges between 20 and 50. Only the AfD is well outside this range: more than 70 percent of all voters have a “very low” opinion of it, leaving it in a lonely outlying position. It is the only party which is rejected by a large majority. This is particularly striking because it is a very high level of rejection by European standards. No other extreme right-wing populist party is rejected as strongly by voters as the AfD (Rovira Kaltwasser et al. 2019).

No alternative for Germany

Another striking aspect here is that the AfD’s enormously high rejection rates have not improved at all since it entered the German Bundestag. With 71 percent of all German voters rejecting the AfD, its negative party identity is almost at the same level as in March 2017. Six months later, it succeeded in entering the Bundestag for the first time in the 2017 federal elections. Nevertheless, establishing its presence in parliament did not lead to an improvement in the AfD’s rejection rates. More than seven out of ten voters in Germany still have a “very low” opinion of the party, making it highly unlikely that they would vote for it in the near future.

The picture is different for Die Linke: in March 2017, it was still at 51 percent, but it has now reduced its rejection rating to about 40 percent. This clearly indicates that Die Linke is being normalized. It is increasingly perceived as a genuine alternative within the established party system. Prejudices and historical resentment are increasingly fading into the background. In June 2020 Die

Linke was thus roughly on a par with the FDP. Both parties are currently rejected by about four in ten voters. This is a record for Die Linke – and a new low for the FDP.

At the end of 2018, the FDP was still in a very narrow range with the SPD, the Greens and the CDU/CSU parties, with a rejection rate of around 30 percent across all voters. Since then, its rejection rate has risen by a third to 40 percent, which is probably mainly due to the party’s behavior after the state elections in Thuringia. On the other hand, the FDP’s withdrawal from exploratory talks on forming a government after the 2017 federal elections did not have a negative impact, at least as far as explicit rejection rates and negative party identities are concerned, which actually declined slightly during this period.

The parties of the Grand Coalition have had a different fate. Their rejection figures show a significant increase up to the end of 2019, especially those of the SPD. In March 2017, the SPD was only rejected by about 14 percent of all voters, whereas in November 2019 the figure was about twice as high at 27 percent. In the same period, the rejection rate for the CDU/CSU rose from 17 to 26 percent. Even if the Grand Coalition, after its long false start in 2018, has subsequently governed “better than its reputation” (Vehrkamp and Matthieß 2019): the governing parties were only recently able to improve their values somewhat in the course of their management of the corona pandemic.

In any case, the extremely low and stable “glass ceiling” for the AfD remains a key feature of negative party identities in Germany.

How populist are the voters of each party?

Populists think differently about many political issues than non-populist voters. Populism thus influences and shapes political attitudes and positions. But does populism also influence party preferences and voting behavior? Do populists vote differently than non-populist voters?

To answer this question, we start by assessing voters' positions as supporters of a particular party, according to their voting intentions. This is determined by their answer to the question known in Germany as the "Sunday question": "Which party would you vote for if there were federal elections next Sunday, or would you not participate in the election?" We therefore map the party-political sympathies of the electorate based on their current electoral policy views, meaning that the strength and composition of each individual party's supporters reflects poll results at the time of data collection for this Populism Barometer in June 2020.

Beyond party preferences, two further assessments are made: we measure the degree of populism and the ideological left-right orientation of those respondents intending to vote. Their tendency towards populism is evaluated using the eight items for identifying populism (see Figure 1 on p. 22) on a populism scale from 0 (=non-populist) to 8 (=populist). In order to capture ideological left-right orientation, voters place themselves on a left-right scale from 0 (=left) to 10 (=right).

By combining these three aspects, we can then draw a nuanced picture of the party landscape in Germany (see Figure 28), which shows the parties according to the average populist tendency and left-right orientation of their current voters.

When interpreting the political orientation of the parties, it is important to look both at their relative positioning compared with each other, and at the comparison of individual party positions with the mean value of populist tendencies and left-right orientation across the average of all voters (dashed lines). We can distinguish between four different quadrants or segments of the party landscape: a right-wing populist segment (more populist than average and at the same time right of the political center) and a left-wing populist segment (more populist than average and at the same time left of the political center), as well as two segments of voters who are non-populist or less populist than average, of which one is located to the left of the political center and the other to the right of the political center.

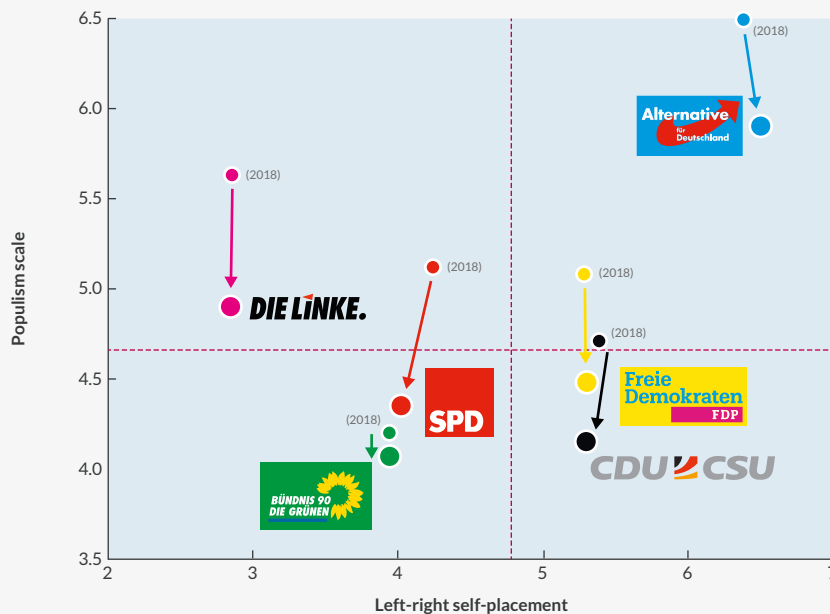
The positioning and movement of the individual parties and their voters across these four segments show a nuanced picture of the current party landscape and how it has changed since the 2017 federal elections.

CDU/CSU and FDP: the decline of populism in the traditional center

One of the most important results of the Populism Barometer 2018 was the sharp increase in populist attitudes in the traditional center (known in German as the "bürgerliche Mitte"). The voters of the CDU/CSU and FDP were significantly more populist than in the election year 2017. In the year before the 2021 federal elections, this development has corrected itself again: according to the Populism Barometer

FIGURE 28 Party voters by populism and left-right orientation

Significant changes since 2018 are represented by arrows.



Note: Dots indicate average for each party's voters; dashed red lines indicate average of all eligible voters in 2020. Target population: German electorate aged 18 and over (sample size 2020: 7,924).

Source: infratest dimap and YouGov on behalf of the Bertelsmann Stiftung

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2020, voters in the traditional center have actually become less populist than they were in the election year 2017. For the time being, it seems that their excursion into more populist realms is over. The temptation of the two center-right parties to follow the populism of the AfD, to imitate it or at least rhetorically adapt to it, has been recognized as a mistake and corrected. The CDU/CSU and FDP are thus once again firmly anchored in the non-populist voter segment, slightly to the right of the political center.

In terms of concrete scale values, the CDU/CSU shows a decline in the average populism of its voters from 4.71 in 2018 to 4.15 this year. The average propensity for populism among these voters is thus 0.51 scale points below the mean value for all voters (4.66). This in turn is 0.65 scale points below the 2018 mean value (5.31). The decline in populist attitudes among CDU/CSU voters is thus roughly average for all voters. At the same time, their self-placement on the right-left axis, with a scale value of 5.3, has remained almost the same since the federal elections in 2017. Ideologically, the CDU/CSU remains slightly to the right of the political center.

The FDP also shows a roughly average decrease in populist attitudes by 0.6 scale points to a scale value of 4.48. The ideological self-placement of the remaining FDP voters corresponds almost perfectly with the self-placement of CDU/CSU voters.

The Greens and the SPD: resistance to populism in the left-liberal center

Voters in the left-liberal center in Germany had largely avoided being drawn into the feverishly populist political climate before and after the 2017 elections. Green voters continue to be the least populist of all in Germany. Resistance to populism thus remains the brand essence of the Green electorate. Nevertheless, it has not become the unique selling point of the Greens in the German party system. The comparatively greater decrease in the degree of populist attitudes among voters of the CDU/CSU, SPD and FDP has brought all these parties into line with each other in the political center.

Nevertheless, the Greens have been able to defend their position as the party with the greatest resistance to populism in the German party system. At the same time, their poll ratings have roughly doubled compared to 2018. This shows that in the political center, it is not more populism but less that leads to better election results. The Greens' success is also a victory for their consistent anti-populism. In the eyes of many voters before and after the Bundestag elections, they have proven themselves to be an island of non-populist calm in a storm of increasingly populist feeling. This has made them even more attractive to non-populist and anti-populist voters from the political center and substantially increased their voter potential.

The scale value for Green voters shows the lowest level of populism in comparison with all other parties, at 4.07. However, the change compared to the previous year is well below average, at only 0.13 scale points. Even after doubling their level of support, the Greens remain a party of the left-liberal center, with an unchanged scale value of 3.94. Their significant shift towards the center after the 2017 federal elections has proved to be a lasting move, but they are still located slightly further to the left of the center than the CDU/CSU is to the right.

The scale values of the SPD even show a slightly above-average decrease in the degree of populism among its voters, declining 0.77 scale points to 4.35. According to the ideological self-placement of its voters, it shifted to the left by 0.22 scale points to a current scale value of 4.02. The positioning of the SPD in terms of the populism and ideological self-placement of its voters is thus much more similar to that of the Greens than it was in 2018. However, the Greens are now occupying the place of market leader in the non-populist voter segment of the center left. With a view to the 2021 federal elections, an interesting competitive situation is emerging around this non-populist voter potential to the left of the political center.

Die Linke: beyond the left-liberal center

Populism in Germany is still most evident on the political margins: in the left-wing populist segment of the electorate, Die Linke has a unique selling point, but it is much less pronounced and extreme than the AfD in the right-wing populist segment.

However, the voter profile of Die Linke shifted significantly after the Bundestag elections: in the 2018 Populism Barometer, its voters were simultaneously more populist and slightly less left-wing than in the 2017 election year, meaning that the rising populism of the traditional center had also affected Die Linke. In contrast to its competitors to the left of the political center, it followed the populist trend of opinion after the 2017 federal elections, at least temporarily and in part.

But Die Linke has now more than corrected this: with a scale value of 4.90, its voters remain somewhat above average in terms of their populist attitude. But they are much less populist than in 2018 (5.64) and are thus even below their 2017 level (5.15). Die Linke does still remain the only party in the left-wing populist segment of the German party system. In the party landscape of the 2017 election year, however, its current populist tendencies could have anchored it in the non-populist segment to the left of the center. On the one hand, this shows how populist feeling has receded overall, lowering the threshold to the populist voter segment. On the other hand, 2018 was a populist outlier which is still having an impact. Therefore, Die Linke is still positioned in the more left-wing populist segment of the German party landscape in 2020. However, its significant move towards the center after the 2017 federal elections has had a lasting effect. In view of its overall position in the German party landscape, Die Linke thus retains its unique selling point as the only party in the left-wing populist voter segment. Compared to the 2017 federal elections, however, it continues to be less left-wing, and it is now also less populist. This has led to a certain rapprochement with the positions of the SPD and the Greens.

AfD: growing dominance of right-wing extremist attitudes

In the German party landscape of 2020, the AfD remains an extreme outlier. It continues to occupy a position in the right-wing populist segment of the electorate that is by far the furthest removed from all other parties and from the average of all voters in terms of populist tendencies and ideological orientation. With a score of 5.9 for populism and 6.5 for right-wing orientation, it has even boosted its unique selling point as a right-wing extremist populist party.

What is striking here is the slight but still significant shift further to the right (+0.12) and the simultaneous decrease in populism (-0.59), which nevertheless remains at a high level. AfD voters are thus clearly less populist and at the same time ideologically positioned somewhat more to the far right of the center than they were in the period of the 2017 federal elections. This shows not only for parts of the party organization and its top politicians, but also from voters' perspectives: the extremely right-wing populist AfD is now increasingly characterized by the extreme right-wing attitudes of its voters, and is drifting deeper and deeper into the extreme right-wing voter segment. Having shrunk by about a third since its peak in the German polls, it is being transformed from a right-wing populist mobilization movement to a party dominated by its voters' increasingly extreme right-wing attitudes. Its ideological voter profile is thus moving more in the direction of the right-wing extremist NPD than in the direction of the established parties slightly to the right of the political center.

Interim conclusion: in the year before the next federal elections, the party system is showing itself to be significantly more resistant to populism

The overall picture of all parties shows, for the first time since 2017, a bloc with a significantly below-average level of populism including all five parties slightly to the left and right of the political center (CDU/CSU, the Greens, SPD and FDP). This non-populist bloc of established parties in the political center currently represents slightly more than 80 percent of all voters. The populism of the political margins, on the other hand, is significantly less pronounced than it was in the year of the last federal election and thereafter. Thus, in the year before the federal elections 2021, the party landscape in Germany is showing itself to be significantly more resistant to populism than it was before and after the 2017 federal elections.

Which parties benefit from the decline in populism among voters?

The only parties benefiting from voters' declining tendency towards populism are the CDU/CSU and the Greens. For all other parties, a declining propensity for populism either has a largely neutral effect (SPD and FDP) or even a clearly negative one (AfD and Die Linke). This "anti-populism bonus" can be measured in the change in the probability of a party being chosen by voters, depending on the degree of populism among voters. The scores in Figure 29 show for each party how much its election results change on average as voters become less populist and their populism decreases by one point on the populism scale.

For the AfD, the declining populism of voters means that their chances of winning votes will deteriorate by nearly five percentage points if voters become less populist by one point on the scale. This means that the party is faced with a completely new situation and challenge: it is no longer profiting quasi automatically from an increasingly populist political climate, as it was before, but is suffering from the decline in populism. And the greater and more sustained the decline in populism is, the more their chances of winning votes will fall in the future. The increasingly non-populist climate across the electorate deprives the AfD of an important mobilization option, especially in the ideological center of the electorate.

This also applies to Die Linke in a much weaker form, whose probability of winning votes decreases by almost two percentage points as populism declines. Die Linke is therefore also unable to profit from the change in the political climate, but is harmed by it, albeit to a much lesser extent than the AfD.

For the SPD and FDP, with their currently low survey levels and very flat populism profiles, the effects of waning populism remain largely neutral. It does not further reduce their electoral chances, but they cannot benefit from it for the time being.

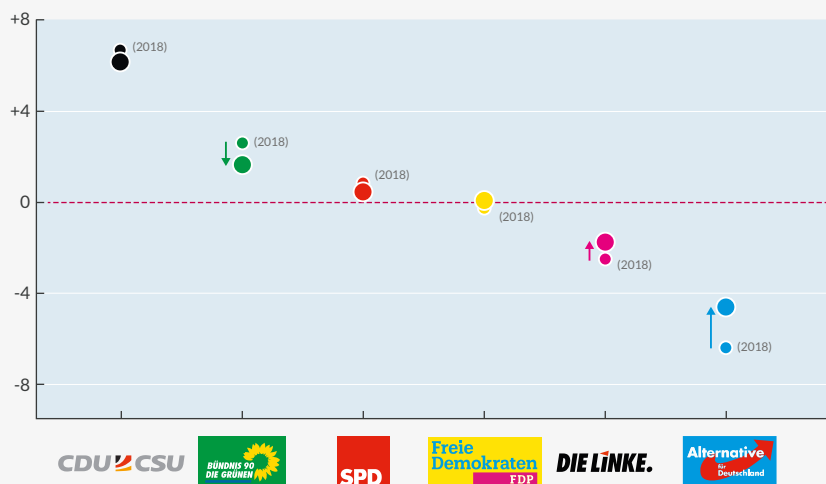
The CDU/CSU remains the party whose electoral chances increase the most (+6 percentage points) with the declining populism of voters. This means that the positive effect of declining populism for the CDU/CSU is even stronger than it is for the Greens (+2 percentage points). For the CDU/CSU, this means that the greater and the more

sustained the decline in populist attitudes is and will continue to be, the more their electoral chances will increase.

Thus, the decline in populism above all gives the CDU/CSU and the Greens (i.e. “black-green coalition”) a stronger position on the electoral market.

FIGURE 29 Change in voting probability

In percentage points (with decrease of one point on the populism scale)



Changes since 2018 are shown by arrows.

Methods: Average marginal effect of the populism scale on predicted probability of intending to vote for party, based on multinomial logistic regression analysis.

Target population: German population over 18 years of age in 2020 intending to vote for a party (excluding non-voters and those intending to cast invalid votes).

Source: infratest dimap and YouGov on behalf of the Bertelsmann Stiftung.

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CDU/CSU: returning to the non-populist center

The CDU/CSU has learned its (anti)populist lesson: the danger of abandoning its traditional brand identity in the non-populist center of society has been averted for the time being. 2019 and 2020 were marked by a return of the Union to its non-populist core values. The detailed analysis for the CDU/CSU this year again shows that it achieves by far its best results in the segment of completely non-populist voters, with almost 60 percent support. In the mostly non-populist segments of the electorate, this figure is still over 40 percent. In the strongly populist segment, however, its share of voters falls to well below 20 percent. This again shows that the Union benefits from the declining populism of voters, because it can gain up to three times more voters in the non-populist segment than it could lose in the populist segment.

However, the Union and especially the CSU had to go through the process of learning this lesson. In the year after the 2017 federal elections, it succumbed at times to the temptation of an increasingly populist political climate in Germany. It thus became caught in a pincer movement between the increasingly non-populist and ideologically centrist Greens and the right-wing populist AfD. Declining approval

ratings were the logical result of taking this party political risk and “surrendering the center” (Vehrkamp 2018). The anti-populist turnaround, especially of the CSU, has put an end to this negative trend and even reversed it by now. Since 2019, the Union parties have been profiting on the voter market by distinguishing themselves clearly from the right-wing populist AfD. By changing their strategy towards active democratic anti-populism, the Union parties are using their potential to profit from voters’ declining populism. In doing so, they are no longer leaving it to the Greens to be the only bastion of non-populism in the populist storm.

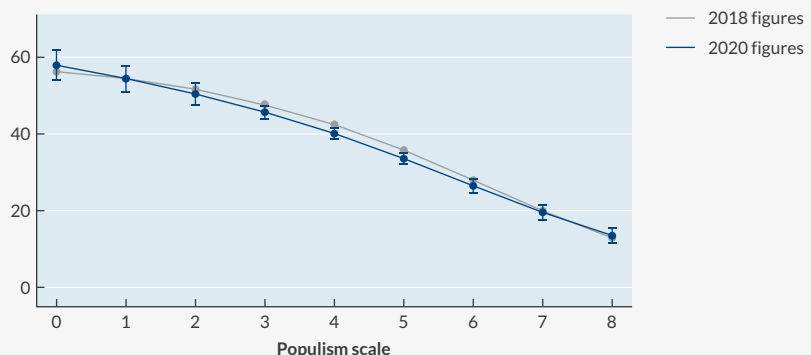
In addition, voters with a populist attitude from the political center also seem to be returning to the Union. In this segment, the Union was able to increase its share of voters by half compared with the 2017 election year, to about 30 percent.

There are two possible explanations for this:

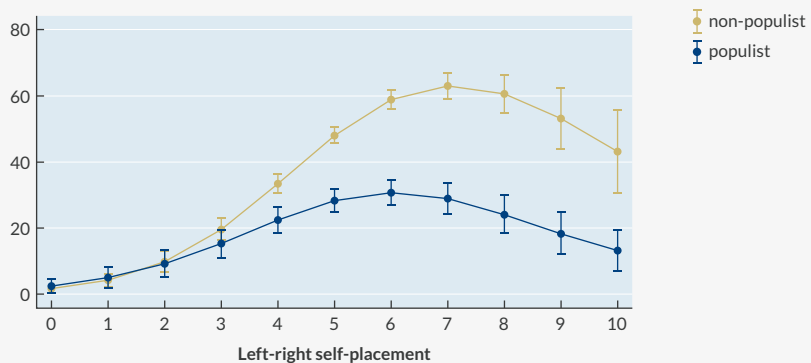
On the one hand, for the AfD, populism is losing its potential for mobilization, because populist-minded voters from the political center in particular are becoming more moderate in their populist views. This distances them from the populism of

FIGURE 30 Populism and voting intentions among CDU/CSU voters

As a percentage



As a percentage



Method: Predicted probability of intending to vote for the party, based on multinomial logistic regression analysis with confidence intervals (95%).

Target population: German population aged 18 and over (sample size in 2020: 7,229).

Source: infratest dimap and YouGov on behalf of the Bertelsmann Stiftung.

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the AfD, which is still significantly more extreme. The distance between moderate and extreme populists is growing. The attraction of an extremely populist mobilization is thus diminishing.

At the same time, it seems that ideological self-placement in the political center is regaining importance for electoral behavior. Populist voters from the center are more likely to reflect on their basic political orientation at the ballot box instead of giving in to their populist tendencies. With respect to the AfD, this means that voters from the political center are increasingly recognizing their own ideological distance from a party whose officials and voters are increasingly characterized by right-wing extremist attitudes. The right-wing extremism of the AfD is becoming more dominant, and has more power to repel voters.

In summary, this means: the weakening populist mobilization makes the right-wing extremist character of the AfD more visible. This double disenchantment with populism is an acid test for the AfD.

The Greens: anti-populist market leader of the center left

The Greens have stabilized and expanded their new brand identity as a non-populist leader in the left-liberal center of the electorate. It is true that their anti-populism is no longer a unique selling point in 2020. But the Greens are still seen by many voters as the new anti-populist original. The Greens are the only party that not only resisted the populist temptation after the 2017 federal elections, but actively fought it from the outset, even after a comparatively disappointing election result in the 2017 federal elections. This makes the Greens the most credible anti-populist force in the German party landscape, in the eyes of many voters.

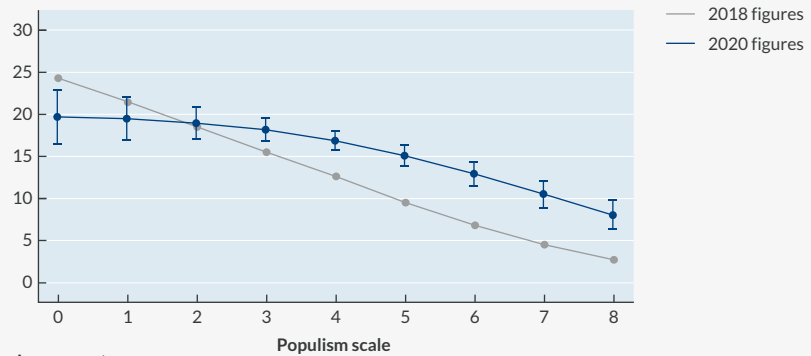
Nevertheless, as the Greens have increased their voter potential and exploited it more fully, their populism profile has changed, becoming somewhat flatter than it was in 2018. Although more than twice as many non-populists as populists still vote for the Greens, their voter shares have also risen in the above-average range of the populism scale. This is probably a typical effect of broadening the voter base. With poll results of more than 20 percent of all voters, this broadening also includes somewhat more populist voter segments.

On the left-right axis of political ideology, however, it is still clear that the Greens are predominantly supported by voters to the left of the center. Even the more populist Green voters are positioned significantly to the left of the political center. The non-populist and populist segments of the Green electorate are thus roughly as left-wing as each other, which should make it easier for the Greens to bring their voters together.

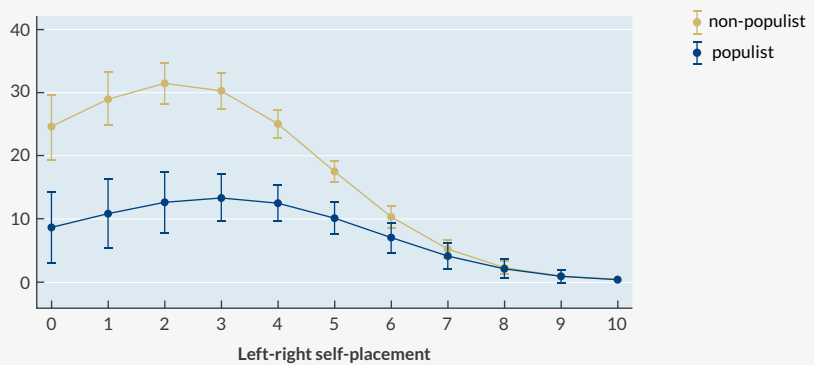
In the overall picture, however, the Greens continue to be characterized above all by their strength in the non-populist voter segments to the left of the center. There they now reach more than 30 percent of all voters. Even in the ideological center, this figure is still almost 20 percent, and even slightly to the right of this, their current poll results still correspond to their average overall result in the 2017 Bundestag elections of almost nine percent.

FIGURE 31 Populism and voting intentions among Green voters

As a percentage



As a percentage



Method: Predicted probability of intending to vote for the party, based on multinomial logistic regression analysis with confidence intervals (95%).

Target population: German population aged 18 and over (sample size in 2020: 7,229).

Source: infratest dimap and YouGov on behalf of the Bertelsmann Stiftung.

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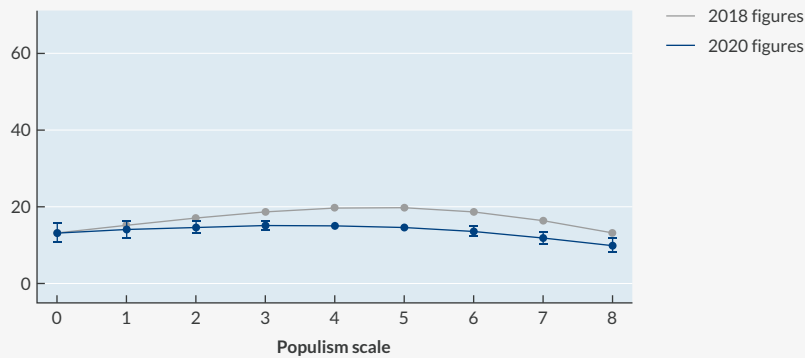
The Greens are currently also reaping the electoral rewards of their consistent anti-populism after the last federal election, and unlike in earlier phases of good polling results, this time their voter potential seems to be stabilizing more permanently, and at a much higher level.

SPD: in search of distinctiveness and profile

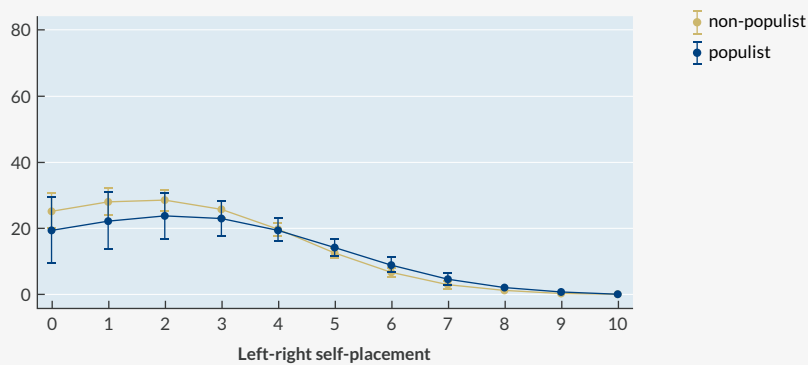
The political profile of the SPD electorate has flattened even further. The already small lead of the non-populist voters over the populist segments to the left of the center has become even smaller. In the 2017 federal elections, the SPD still had a discernible voter focus, with values of almost 40 percent among voters with slightly above-average populist attitudes. Today, the SPD finds a similarly reduced level of support right across the populism scale, irrespective of the voters' tendency towards populism. Differences between very non-populist and very populist segments of the electorate are now almost non-existent and no longer statistically significant.

FIGURE 32 Populism and voting intentions among SPD voters

As a percentage



As a percentage



Method: Predicted probability of intending to vote for the party, based on multinomial logistic regression analysis with confidence intervals (95%).
 Target population: German population aged 18 and over (sample size in 2020: 7,229).

Source: Infratest dimap and YouGov on behalf of the Bertelsmann Stiftung.

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The only way in which the current voters of the SPD stand out is in their positioning left of the ideological center. Their share of voters only clearly reach double figures in the political center and to the left. To the right of the center, their values usually remain in single digits.

The SPD's remaining electorate at its current polling level below the 20 percent mark are populist and non-populist voters who place themselves to the left of the center. Since even the slight differences between left-wing non-populists and populists are not statistically significant, the SPD cannot derive any further profiling of its voter target groups from this. Thus, in the year before the next federal election, the SPD remains a party in search of a distinctive voter profile and clearly definable and delimited voter target groups.

AfD: on the way from a right-wing populist mobilization movement towards a right-wing extremist party

Lack of distinctiveness and profile are not a problem for the AfD. Its clearly populist voter profile remains almost unchanged. The five percent hurdle is not cleared until the AfD reaches 4 on the populism scale. Then, as voter populism increases, it climbs as high as 30 percent. In the segment of extremely populist voters, the AfD nevertheless shows at least a slight decline in voter success, although this is not statistically significant.

However, the declining mobilization power of populism is also evident when we look separately at the populists and non-populists among AfD voters. While the proportion of AfD voters in the populist voter segments in the political center has declined, the proportion of right-wing extremist non-populists has risen from under 40 percent to more than 50 percent and the proportion of right-wing extremist populists from just under 70 to about 80 percent. Even if these shifts are not yet statistically very robust, a common driver and the pattern of at least a creeping shift in voter numbers for the AfD seems to emerge: the AfD is losing populist voters from the center and at the same time becoming ideologically more right-wing. In any case, the profile of the AfD as a right-wing populist mobilization movement was clearer in the 2017 federal elections than it is today. Now that the populist atmosphere has cooled down, the AfD is showing ever clearer characteristics of a party whose voters are increasingly characterized by extreme right-wing attitudes.

Two narratives can be used to explain this development:

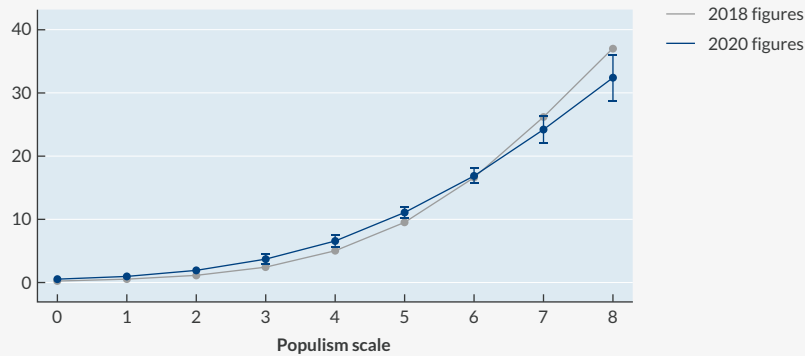
On the one hand, the somewhat less extreme populism of AfD voters is making populism less important as a decisive motive for voting. Until now, many AfD voters, especially from the political center, have chosen the AfD as a populist protest party. At any rate, populists from the political center did not vote for the AfD because it was on the extreme right, but as a populist alternative to the established parties. Populism was the Trojan horse of the AfD in this phase of voter mobilization in the ideological center. As populism diminishes, however, this mobilization strategy loses its attractiveness and power, also and especially in the political center.

On the other hand, the AfD, which is already ideologically on the far right anyway, is shifting even further to the right. In the segment of right-wing extremist non-populists, the AfD has more than doubled its share of voters since the federal elections, from just under 20 percent to over 50 percent this year.

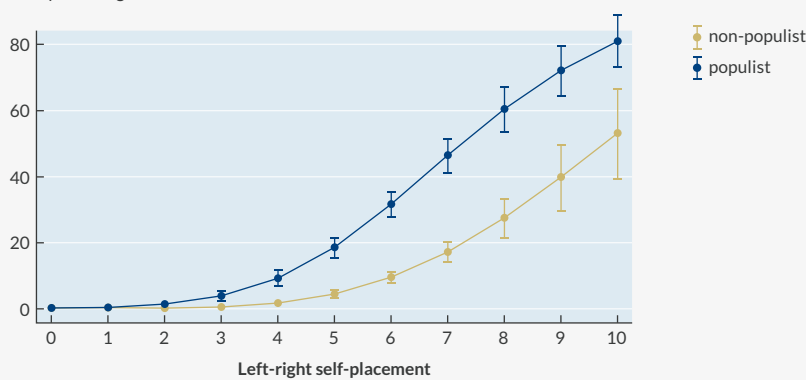
This also shows: the AfD is currently developing from a right-wing populist mobilization movement to a party increasingly shaped by right-wing extremist attitudes. This trend is driven and strengthened by the fact that the populist climate in Germany is evidently cooling down. The AfD is affected in two ways: it is losing populist protest voters from the center, who are turning back to the established parties. And it is developing a voter profile that is increasingly characterized by extreme right-wing attitudes (see “In Focus” on p. 18). The struggles for direction and the looming split among AfD party officials are thus also reflected at the voter level: the rift between right-wing populists and right-wing extremists in the AfD is also evident at the ballot box. At the voter level, it seems that right-wing extremists are currently displacing right-wing populists rather than the other way around.

FIGURE 33 Populism and voting intentions among AfD voters

As a percentage



As a percentage



Method: Predicted probability of intending to vote for the party, based on multinomial logistic regression analysis with confidence intervals (95%).

Target population: German population aged 18 and over (sample size in 2020: 7,229).

Source: infratest dimap and YouGov on behalf of the Bertelsmann Stiftung.

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Die Linke: moderate populism on the left

In 2018, Die Linke was on its way to becoming a quintessentially left-wing populist party. Although this development has not been reversed, it has at least come to a halt. On the non-populist half of the populism scale, the party's share of voters is well below ten percent. Only when the level of populism is above average, from 5 upwards, does the party's share of voters rise to more than ten percent. Overall, the more populist voters are, the more likely they are to vote for Die Linke. However, this effect remains comparatively weak, and is not nearly as pronounced as it is for the AfD.

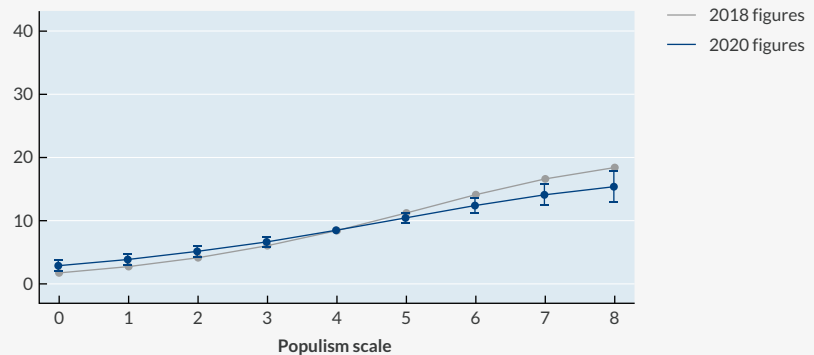
The ideological profile of Die Linke is much more pronounced: it is almost exclusively supported by voters who position themselves clearly to the left of the center. This applies to non-populist voters to the left of the center and even more so to populist left-wing voters. In this respect, integrating its populist and non-populist voter segments remains a central challenge for Die Linke in the year before the next federal election in 2021.

Taking a distinctly populist course would risk the support of the ideologically leftist non-populists among its voters. Although they are somewhat fewer in number than the left-wing populists, they seem to be overrepresented among party members and officials. In addition, a more populist course would carry the risk that the more moderately left-wing non-populists would migrate to the SPD and the Greens, which are available as electoral alternatives in the non-populist voter segment left of the center.

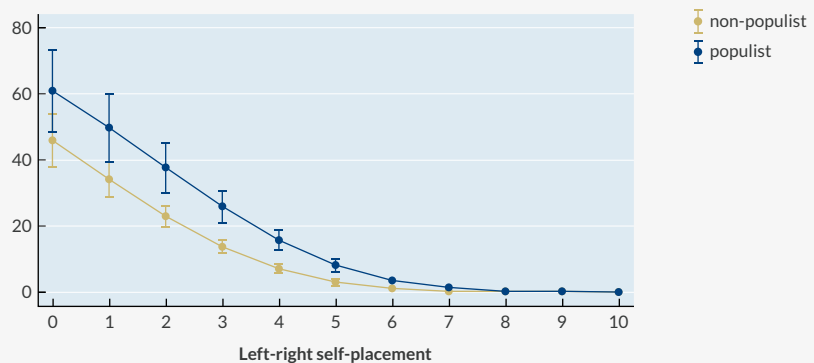
On the other hand, if Die Linke took an emphatically non-populist course, it would risk the support of the explicitly populist left-wingers among its voters. At the same time, it could open up new possibilities in the non-populist voter segments to the left of the political center. However, Die Linke is in competition with the SPD and the Greens. More than for other parties, then, dealing with populism remains a balancing act for Die Linke. This is due above all to the relatively balanced composition of its voters, including both populists and non-populists. Ideologically, they are similarly far to the left of the political center. However, their attitudes to many issues are often spread out on the populism scale and difficult to integrate in electoral politics.

FIGURE 34 Populism and voting intentions among Die Linke voters

As a percentage



As a percentage



Method: Predicted probability of intending to vote for the party, based on multinomial logistic regression analysis with confidence intervals (95%).
Target population: German population aged 18 and over (sample size in 2020: 7,229).

Source: infratest dimap and YouGov on behalf of the Bertelsmann Stiftung.

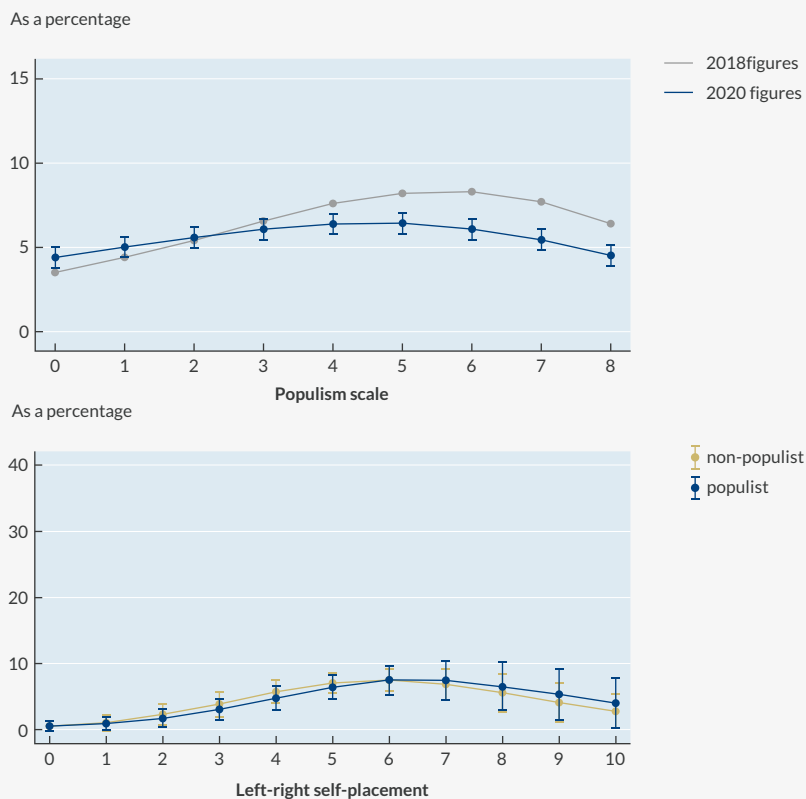
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FDP: loss of profile in non-populist voter base

In the year before the 2021 federal elections, the FDP shows a similarly flat populist profile to the SPD. Across the entire populism scale, their support is only at about five percent, which means that populists and non-populists are equally unlikely to vote for them. In 2018, the FDP was able to profit slightly from rising populism among voters and was somewhat more likely to win votes among people with slightly above-average populist attitudes.

However, the core voters of the FDP have always been to the right of the political center in the non-populist segment. In the year of the Bundestag elections, the party reached about 15 percent of all voters in this segment. In this core voter group, it has made serious losses since 2017. One possible reason for this is the party's withdrawal from exploratory negotiations and its accompanying refusal to participate in government after the last federal elections. Non-populist voters particularly tend to expect that their votes will allow them a say in solving problems, most effectively through participation in government. Populist voters often already feel that their vote is justified by their need to protest against the established

FIGURE 35 Populism and voting intentions among FDP voters



Method: Predicted probability of intending to vote for the party, based on multinomial logistic regression analysis with confidence intervals (95%).
Target population: German population aged 18 and over (sample size in 2020: 7,229).

Source: infratest dimap and YouGov on behalf of the Bertelsmann Stiftung.

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parties and the government. Non-populist voters expect more from their parties: they place an emphasis on political (co-)responsibility and on shaping policy. This expectation has been disappointed by the FDP, which has almost completely lost its base of non-populist voters to the right of the political center. Its differing levels of support among populists and non-populists have melted away, leaving only a statistically insignificant residue. Thus, we can no longer even say with any certainty whether the FDP is still more likely to win votes from non-populists than from populists.

This means that the FDP is currently unable to profit from the declining populism of voters in Germany and from the emerging reversal in the trend towards a political climate of opinion that is once again rather non-populist and democratic. Regaining its constructive and non-populist brand identity as a party capable of governing and solving problems, and thus winning back its voter base, will be a question of survival for the FDP in the year before the 2021 federal elections.

Methodological appendix

Throughout the study, in all relevant analyses, we use survey weights to adjust the results to the German population over 18 years of age.

Chapter 1

The eight populist items in Figure 1 originate in part from the academic literature (see e.g. Akkerman et al. 2013; Hawkins et al. 2012), and were in part developed specifically for this study. Confirmatory factor analyses (CFA) confirm that all items load on a common factor (CFI: 0.962; TLI: 0.946; RMSEA: 0.072; SRMR: 0.030). Cronbach's alpha also indicates the high reliability of the scale, at 0.88.

For the comparison over time with 2019, this study uses a YouGov survey from the Democracy Monitor, which covers a sample size of 10,374 respondents. For all other time comparisons, the Populism Barometer 2020 uses population-representative surveys that were collected by infratest dimap on behalf of the Bertelsmann Stiftung (Vehrkamp and Merkel 2018; Vehrkamp and Wratil 2017). Due to differences in the sampling frame and the sampling procedure of the different institutes, we cannot be absolutely certain that small differences between the surveys represent differences in attitudes. However, there are only small differences between the surveys "YouGov 2019" and "infratest dimap 2019", which were conducted simultaneously.

Field times and sample size at a glance:

- Follow-up YouGov 2020: July 27 – August 3, 2020; Sample size: 5,030
- YouGov 2020: June 8 – June 29, 2020; Sample size: 10,055
- YouGov 2019: October 31 – November 25, 2019; sample size: 10,374
- infratest dimap 2019: October 31 – November 17, 2019; sample size: 3,434
- infratest dimap 2018c: November 16 – November 26, 2018; sample size: 2,795
- infratest dimap 2018b: August 2 – August 20, 2018; sample size: 3,323
- infratest dimap 2018a: May 29 – June 11, 2018; sample size: 3,427
- infratest dimap 2017: March 13 – March 30, 2017; sample size: 2,371

For the analysis of the social desirability of populist attitudes (Figure 6), a total of three listexperiments were carried out in the YouGov 2020 follow-up survey. The basic survey design of these experiments is illustrated in Figure 36. Details on the design, theory and analysis of the list experiments can be found in Neuner and Wratil (2017). The figures presented in this study are derived from a simplified analysis of the list experiments through a "difference-in-means" estimator.

FIGURE 36 Example list experiment design

Please indicate how many of the statements you agree with and how many you disagree with.
Please do not tell us which of the statements you agree or disagree with, only how many.

GROUP A

The “coronavirus crisis” will cause great economic damage.

Russia is a trustworthy partner for Germany.

NATO is important for securing peace in Europe.

Number of statements which you...



agree with



do not agree with

GROUP B

Environmental protection is a top priority, even if it hurts economic growth.

Nuclear energy is necessary to secure the energy supply.

The state shouldn't take on any more debt, even if that means it can't spend as much.

Ordinary people are all on the same side.

Number of statements which you...



agree with



do not agree with

Source: Own illustration.

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The following three items were used to measure direct and indirect populism (Schulz et al. 2017; Castanho Silva et al. 2017).

Ordinary people are all on the same side.

The people should be consulted in all important decisions.

Whether a person is good or bad can be judged by their politics.

To measure right-wing extremist attitudes for the section “In Focus” and the corresponding illustration on p. 18/19, this study uses six attitudinal dimensions: 1. advocating a right-wing dictatorship, 2. chauvinism, 3. trivializing National Socialism, 4. xenophobia, 5. anti-Semitism, and 6. advocating racist social Darwinism (Decker and Brähler 2006). This study thus follows the definition of right-wing extremism which has been agreed upon by researchers, and which has also been used for years in the Leipzig authoritarianism study (Decker and Brähler 2018) and the “Mitte-Studie” (Zick et al. 2019). See Figure 37 for an overview of the items. The CFA of the model of right-wing extremism with its six dimensions confirms that the dimensions each load on one factor (CFI: 0.973; TLI: 0.967; RMSEA: 0.050; SRMR: 0.035).

For Figure 15, the respondents were divided into the categories of “manifestly” and “not manifestly” right-wing extremist by aggregate indices on the individual dimensions. A “manifestly” right-wing extremist attitude in a particular

dimension is based on a respondent's level of agreement with the statements: if respondents "mainly agree" with the statements in that dimension, reaching at least a value of 12 in the aggregate index, this means that their right-wing attitude is "manifest". The minimum value is 3, the maximum is 15 index points. On the aggregate level of all 18 items, the respondents were divided into the categories of "manifestly", "latently" and "not" right-wing extremist, again using aggregate indices. Respondents were classed as "manifestly" right-wing extremist if they reached at least a level of 63 in the aggregate index. Overall, such respondents agree with all 18 items at a level of at least 3.5, with five answer categories per item (Decker et al. 2012). Respondents who achieve a score of at least 54 were classified as "latently" right-wing extremist. Their average responses at least include partial agreement across all 18 items. Thus, respondents are categorized in the same way as in the Leipzig authoritarianism study, which defines respondents who partially agree with all 18 individual items as "latent" (Decker and Brähler 2018). All other respondents were classified as "not" right-wing extremist.

FIGURE 37 Measuring right-wing extremist attitudes

1. Advocating a right-wing dictatorship

- In the national interest, under certain circumstances a dictatorship is the better form of government.
- What Germany needs now is a single strong party that embodies the ethnic nation ("Volksgemeinschaft") as a whole.
- We should have a leader ("Führer") who governs Germany with a strong hand for the benefit of all.

2. Chauvinism

- We should finally be brave enough to have a strong national feeling again.
- What our country needs today is a hard and energetic assertion of German interests towards other countries.
- The ultimate goal of German politics should be to give Germany the power and recognition it deserves.

3. Trivialization of National Socialism

- If it hadn't been for the extermination of the Jews, Hitler would be considered a great statesman today.
- The crimes of National Socialism have been greatly exaggerated by historians.
- National Socialism also had its good sides.

4. Xenophobia

- Foreigners only come here to exploit our welfare state.
- When there are not enough jobs, foreigners should be sent back to their home countries.
- Germany has been infiltrated by foreigners to a dangerous degree.

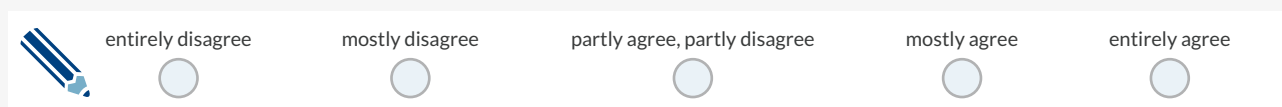
5. Anti-Semitism

- Even today, the Jews have too much influence.
- More than other people, the Jews use evil tricks to achieve what they want.
- The Jews simply have something special and peculiar about them and do not really fit in with us.

6. Social Darwinism

- As in nature, the stronger should always win in society.
- The Germans are actually naturally superior to other peoples.
- Some lives are valuable, some are worthless.

Response categories



Note: Items from Decker and Brähler (2018).

Source: Own illustration.

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The two items for measuring an authoritarian understanding of democracy in Figure 12 also come from the academic literature, and have already been used in this way or similarly in the World Values Survey and the European Social Survey. To identify respondents with an authoritarian understanding of democracy, an aggregated index was generated (range: 2 to 14). Respondents with a value of at least 10, i.e. an average response rate of at least 5, were classified as “authoritarian democrats”.

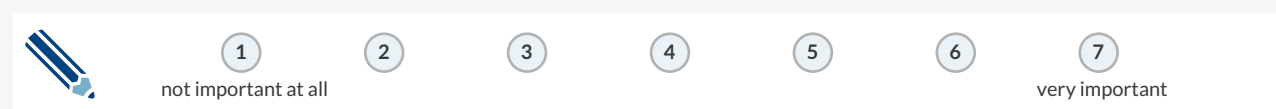
FIGURE 38 Measuring an authoritarian understanding of democracy

In your opinion, how important is it for democracy in general, ...

... that there is a strong leader who does not need to worry about parliament?

... that the military takes over the government in cases of incapacity?

Response categories



Source: Own illustration.

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In order to identify the non-voters in Figure 11, respondents were counted who indicated in the “Sunday question” that they did not want to participate in the election. Therefore, it cannot be said with one hundred percent certainty whether these respondents are actual non-voters. Due to socially desirable response behavior, it is conceivable that the number of actual non-voters is greater. Thus, the procedure differs from the Populism Barometer 2018, which is why the figures are only comparable to a limited extent.

Furthermore, Chapter 1 uses survey results for the following questions and related items that are not given in detail in the text:

Below are several statements about politics and society. For each statement, please indicate the degree to which you agree with it.

- a. *I am very satisfied with the functioning of democracy in Germany.*
- b. *All in all, democracy is the best political system.*
- c. *Membership in the European Union is a good thing for Germany.*
- d. *In the past, European integration has gone too far – in the future, I’d rather see “less” than “more” Europe.*

strongly agree

mostly agree

mostly disagree

strongly disagree

And if you think of the following parties: how high is your general opinion of the...

CDU

CSU

SPD

...

Very high

Quite high

Quite low

Very low

If you think about the party ...: would you vote for that party in one of the following three elections?

Election to the Bundestag

No, definitely not

Probably not

Maybe

Yes, definitely

Chapter 2

For the conjoint experiment, each respondent was presented with five pairs of political candidates. The analyses for all eligible voters are thus based on 1,688 respondents and 16,880 candidate profiles (issues: EU, taxes, refugees, free trade and globalization), or 1,681 respondents and 16,810 candidate profiles (issues: euro, social housing, protectionism, direct democracy). The findings are based on the “average marginal component effects” regression estimator (see e.g. Hainmüller et al. 2014), with standard errors clustered by respondent. All attribute characteristics were chosen entirely randomly. Political priorities were the only exception: the first and second priorities were not permitted to be identical. The findings presented are corrected for the resulting differences in the probability of individual vignette profiles. The basic survey design of the conjoint experiment is illustrated in Figure 39. The individual subject positions are shown in Figure 40.

FIGURE 39 Example conjoint experiment design

Please read the descriptions of the two candidates carefully.

Then let us know which of the two candidates you would rather vote for in a federal election

ATTRIBUTES	CANDIDATE A 	CANDIDATE B 
FIRST POLITICAL PRIORITY	Leading Germany out of the crisis	Making globalization fairer
SECOND POLITICAL PRIORITY	Strengthening civil rights and liberties	Stopping Islamization
POSITION ON FREE TRADE & GLOBALIZATION	Supports somewhat less free trade and globalization	Supports much less free trade and globalization
POSITION ON TAXES	Supports much higher taxes on the rich	Supports much lower taxes on the rich
POSITION ON THE EUROPEAN UNION	Supports the development of the EU into a common state	Supports stronger cooperation within the EU
POSITION ON REFUGEES	Supports the admission of a great many new refugees	Supports the deportation of a great many refugees

If you had to decide between these two candidates in a federal election, who would you vote for?

Even if neither of the two candidates appeals to you, please indicate the one you would prefer to vote for.



CANDIDATE A 

CANDIDATE B 

Source: Own illustration.

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FIGURE 40 Attributes and levels in the conjoint analysis

ATTRIBUTES	LEVELS
POSITION 1 TAXES	<i>(Baseline: Supports much lower taxes on the rich)</i> Supports much higher taxes on the rich Supports somewhat higher taxes on the rich Supports somewhat lower taxes on the rich
POSITION 2 ADMISSION OF NEW REFUGEES	<i>(Baseline: Supports the deportation of a great many refugees)</i> Supports the admission of a great many new refugees Supports the admission of some new refugees Supports the deportation of some refugees
POSITION 3 FREE TRADE AND GLOBALIZATION	<i>(Baseline: Supports much less free trade and globalization)</i> Supports much more free trade and globalization Supports somewhat more free trade and globalization Supports somewhat less free trade and globalization
POSITION 4 EUROPEAN UNION	<i>(Baseline: Supports the withdrawal of Germany from the European Union)</i> Supports the development of the European Union into a common state Supports stronger cooperation within the European Union Supports weaker cooperation within the European Union
POSITION 5 EURO	<i>(Baseline: Supports a much lower level of economic cooperation within the eurozone)</i> Supports a lower level of economic cooperation within the eurozone Supports a higher level of economic cooperation within the eurozone Supports a much higher level of economic cooperation within the eurozone
POSITION 6 SOCIAL HOUSING	<i>(Baseline: Supports much lower investments in social housing)</i> Supports greater investment in social housing Supports lower investment in social housing Supports much greater investment in social housing
POSITION 7 PROTECTIONISM	<i>(Baseline: Supports much higher duties on foreign goods and services)</i> Supports higher duties on foreign goods and services Supports lower duties on foreign goods and services Supports much lower duties on foreign goods and services
POSITION 8 DIRECT DEMOCRACY	<i>(Baseline: Supports far more referendums)</i> Supports more referendums Supports fewer referendums Supports far fewer referendums

Source: Own illustration.

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Chapter 3

The results in this chapter are based on various multinomial logistic regression analyses. The populism scale is the sum of agreement with the eight populist items, rescaled per item from 0 (“strongly disagree”) to 1 (“strongly agree”). In all models we check for education, income, gender, age and left-right self-placement. For respondents who were not positioned on the left-right scale, the scale value “5” was imputed. To calculate all predicted probabilities in the chapter, the covariates were fixed at their observed values (“observed-value approach”). This allows these probabilities to be interpreted as an estimate of their shares in the target population (Hanmer and Ozan Kalkan 2013).

Voting intentions: multinomial logistic regression ($n = 7,229$) with the various parties as outcomes and the populism scale and factor variable of populist attitude groups as main regressors. Respondents who indicated that they “would not vote”, “would cast an invalid vote”, “do not know” and “not specified” in response to the “Sunday question” were excluded from the analysis.

Which party would you choose if there were a federal election next Sunday, or would you do not participate in the election?

CDU / CSU

SPD

...

For further information about the methodology of the study, please contact the authors.

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