



Populism Barometer 2018

Populist Attitudes
of Voters and Non-Voters
in Germany 2018

Robert Vehrkamp and Wolfgang Merkel



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Authors

Dr. Robert Vehrkamp

is Senior Advisor of the “Future of Democracy” program at the Bertelsmann Stiftung and currently visiting scholar in the Department “Democracy and Democratization” at the Berlin Social Science Center (WZB).

robert.vehrkamp@bertelsmann-stiftung.de

Prof. Dr. Wolfgang Merkel

is Director of the Department “Democracy and Democratization” at the Berlin Social Science Center (WZB) and Professor of Comparative Political Science and Democracy Research, Humboldt-Universität zu Berlin, Department of Social Sciences.

wolfgang.merkel@wzb.eu

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About the study

This study is based on an online panel survey. The sample is representative of those eligible to vote in the 2017 federal elections. The survey was carried out by infratest dimap on behalf of the Bertelsmann Stiftung, between May 2018 and June 2018. Altogether, 3,427 respondents were interviewed. These can be divided into 2,322 voters and 1,105 non-voters, who were identified as such on the basis of post-election surveys at the time of the 2017 general elections, and were drawn from a pool of roughly 20,000 people surveyed at that time. The “in focus” figure “No Alternative for Germany” is based on a second survey which took place in August 2018. This included 3,323 panel respondents, of which 2,783 come from the first panel survey and 540 were added.

At the same time, supporters of the AfD, Die Linke (the Left Party), Bündnis 90/Die Grünen (the Green Party) and the FDP were over-represented in the sample, in order to make more precise inferences about these groups. For all results of this study, respondents’ answers were weighted on the basis of microcensus data and representative data from the 2017 federal election, so as to correct for differences between the sample and the German electorate in terms of region, age, education and gender. The results are therefore representative of those eligible to vote in Germany at the time of the 2017 federal election. In addition, the weighting design compensates for the overrepresentation of AfD, Die Linke, the Greens and FDP voters in the sample. The statistical uncertainty of the results varies across the analyses, and in parts of the study we draw attention to this by displaying confidence intervals.

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Foreword

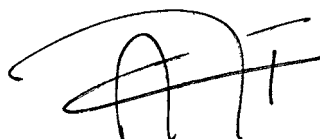
Populism remains one of the greatest challenges facing liberal democracies: in many Western countries, 2018 has been another year shaped by the further growth of populist parties and movements. In the USA, democratic institutions remain under pressure. In Italy, two populist parties constitute the new government: *MoVimento 5 Stelle* and *Lega*. In Hungary, the rightwing populist party *Fidesz* has defended its majority. In the Swedish parliamentary elections, the *Sve- den Democrats* achieved a record result. And in Germany, too, the *Alternative für Deutschland* (AfD) became the first rightwing populist party in postwar history to enter parliament. Meanwhile, however, the Netherlands managed to keep rightwing populists out of the new government – following the lead of the French presidential and parliamentary elections. Light and shadow, when it comes to the political challenge which will continue to be a concern for mainstream parties and institutions in our democracies.

To what extent has the arrival of the AfD in the German parliament changed the political climate in Germany? Have the Germans become more populist? How strong are the forces of a non-populist counter-mobilization? And how successful are the strategies of the other parties in dealing with the rightwing populist challenge?

These are the key questions of our Populism Barometer in 2018. It builds on the 2017 study, “A Populist Moment?”, and updates its findings as well as the questions it posed. Once again, this has been achieved by evaluating the results of a survey that is representative for Germany, which the Bertelsmann Stiftung conducted together with infratest dimap in summer 2018. The present study was developed within our shared project, “Democracy Monitor”, together with the Department “Democracy and Democratization” at the Berlin Social Science Center (WZB).

The results show that populist attitudes in Germany are increasing – most of all, in the political center. However, it is mainly the parties on the political margins which benefit from this. Above all the AfD, whose populist mobilization appeals to ever more voters in the political center. All attempts by the mainstream parties to stop this development have so far been unsuccessful. And this despite the fact that there are issues and standpoints in Germany which would enable bridges to be built across the political camps. “More Europe” and especially the new social questions, such as affordable housing, offer opportunities to mobilize people and gain their support, and not just among non-populist voters. These issues also reach far into the populist camp.

The mainstream parties should use this chance before the populists do. This study aims to point out such options and paths, in order to meet the populist challenge.

A handwritten signature in black ink, consisting of a large, stylized 'A' followed by a series of loops and a final vertical stroke.

Aart De Geus

Chairman of the Bertelsmann Stiftung Executive Board

Executive Summary

Populism Barometer 2018:

Populist attitudes of voters and non-voters
in 2018

The extent and intensity of populist attitudes continue to grow. Particularly in the political center and among the voters of Die Linke. However, it is mainly the AfD which has benefited from this so far. Have the mainstream parties failed in their current strategy against the growth of rightwing populism in Germany?

More than three in ten people in the German electorate (30.4 percent) hold populist views. This is around 4 percent more than in the previous year. At the same time, the proportion of explicitly non-populist voters has decreased by just over 11 percent. A large part of the increase in populist attitudes across the electorate can be explained by an increasingly populist political center. Around one in eight voters (12.7 percent) are currently populist and position themselves in the political center. Last year, this was still around one in nine. This increase in populism in the political center is intensified by the fact that the proportion of explicitly non-populist voters has sunk by slightly more than a fifth.

It is above all the political margins which have been able to profit from this, and the AfD has made by far the biggest gains. It uses its populism as an active mobilization strategy in the political center: voters on the right opt for the AfD because it is very rightwing, while in the center, the AfD wins the most voters from among those who hold populist views. The same goes, to a lesser extent, for Die Linke: ideologically leftwing voters support it due to its leftwing program, whereas voters from the center choose it as a populist alternative to the established range of parties.

The potential of the AfD to win votes still remains limited, as is shown by the negative voting intentions collected for the first time by the Populism Barometer: these show that more than seven out of ten (71 percent) of the electorate fundamentally reject the AfD and would “definitely not” vote for the party. This means that the AfD meets with about the same level of rejection as the rightwing extremist NPD.

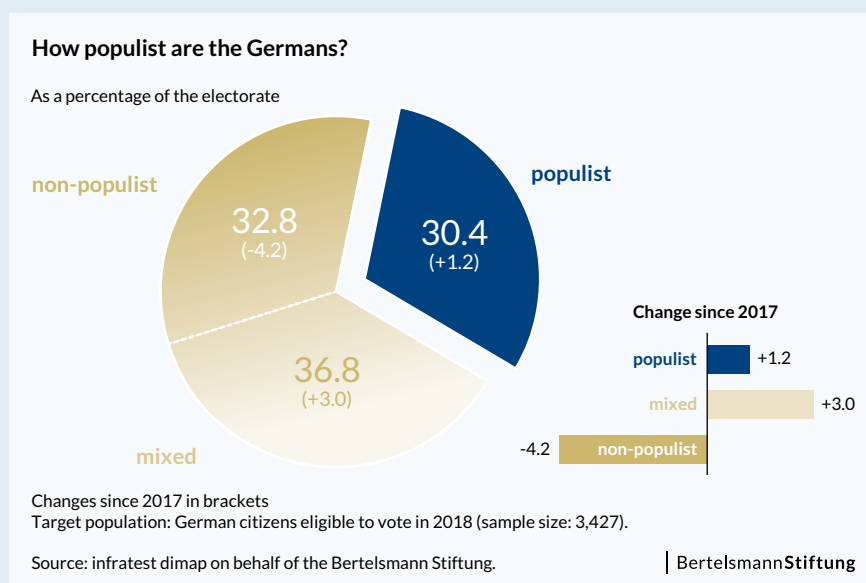
The increase in populist attitudes is particularly problematic for the CDU/CSU, and to some extent also for the FDP: with more populism, both parties are risking their non-populist brand essence. Both have more to lose in the non-populist center than they can win among populist voters. That benefits the Greens in particular, which are becoming the market leader in the distinctly non-populist segment left of the center. Meanwhile, the SPD is increasingly wearing itself down as it tries to bridge the gap between the populist and non-populist segments of its voters.

When it comes to issues and standpoints, “more Europe” and “more social policy” emerge as opportunities which the mainstream parties have so far failed to use for new mobilization. Social issues are especially capable of raising approval rates among both non-populist and populist voters. A chance which the mainstream parties should use before the rightwing populists do so.

Populist attitudes are on the increase

Already in the election year 2017, populist attitudes were widespread in Germany. Since the elections, this figure has continued to grow. Populism is increasing in its extent and its intensity: more than three in ten eligible voters in Germany (30.4 percent) are populist. That is around 4 percent or 1.2 percentage points more than in the previous year (29.2 percent).

This trend is shown even more clearly by the decreasing proportion of entirely non-populist voters, which has sunk by more than a tenth. Their share in the electorate has shrunk by over 11 percent. More than a third (36.8 percent) of the electorate cannot be placed in either group, and are therefore neither explicitly populist nor explicitly non-populist. This group of “mixed” voters has grown by almost 9 percent since the year before.



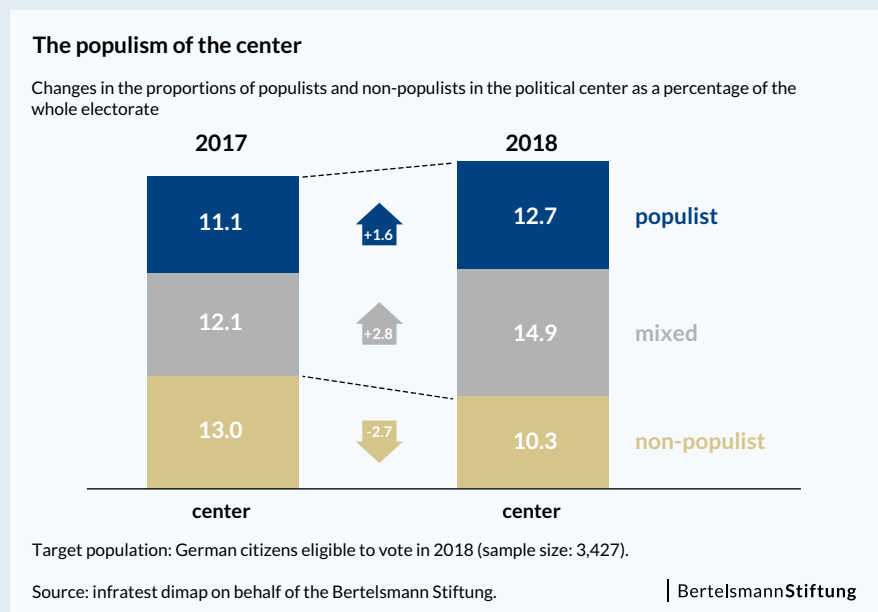
In the overall picture, the German electorate is therefore increasingly populist. The share of non-populist voters is decreasing, while the proportions of “mixed” voters and explicit populists are noticeably increasing.

But populism has not only increased in terms of the proportion of populist voters. The intensity of populist attitudes has risen, too. Compared with the previous year, populist tendencies across all voters on average on a scale from 0 (non-populist) to 8 (populist) have climbed by 0.22 scale points from 5.09 to 5.31. This may seem marginal at first, but it proves to represent a statistically significant intensification of populist tendencies in Germany.

On the other hand: more than two thirds of all German voters are still either not populist or at least not explicitly populist. The rise of populism since last year should, however, be enough to warn us not to see this as being set in stone, or to take it for granted. Because, as the results of the 2018 Populism Barometer show: the overall political climate in Germany is becoming more populist.

The increasing populism of the political center

A large part of the overall increase in populist attitudes is explained by the increasingly populist political center. Around one in eight members of the electorate (12.7 percent) currently hold populist views and place themselves in the political center. Last year, this was still around one in nine (11.1 percent). That corresponds to an increase of more than 14 percent compared with the election year 2017. This populism of the political center is exacerbated by the simultaneous decrease, by slightly more than a fifth, in explicitly non-populist voters, and the growing proportion of voters who are at least “mixed”, which has even risen by almost a quarter.



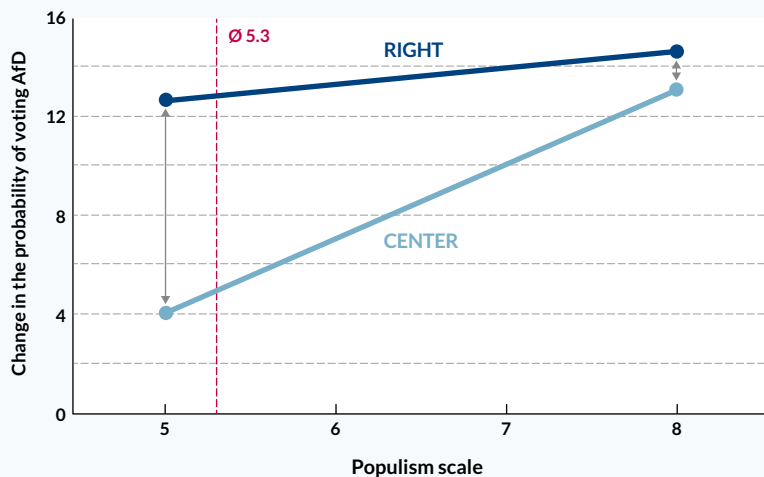
But the share of populist voters in the center has not only increased in number. The average level of populism has also risen more in the political center than across the electorate on average. In the political center, we still find the most explicitly non-populist voters: around one in ten (10.3 percent) are entirely non-populist, and another 15 percent are at least only partly populist. More than a quarter of the whole electorate, then, are non-populist centrist voters.

But the warning signs remain: there is no other segment of voters in which the creeping growth of populism is so clear than in the political center.

This is also shown by the successful efforts of the AfD at populist mobilization in the center: while the change in the probability of voting for the AfD is still around 4 percentage points just left of the average populist tendency, it triples with the increasing populism of the voters in the political center to 13 percentage points. Rightwing people vote AfD because it is a rightwing party, and voters from the center support the AfD because it is populist. The mobilization strategy of the AfD in the center is its populism. This means that populism is a kind of Trojan horse for the rightwing AfD in the political center. AfD supporters in the center vote for populism, but in doing so, they get a party which is ideologically further to the right than their own ideological position, because the “thin ideology” of populism is loaded with rightwing content by the AfD.

The populist mobilization of the center

Changes in the probability of voting for the AfD, according to voters' level of populism in the political center and on the right (in percentage points)



Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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CDU/CSU: surrendering the non-populist center?

The CDU/CSU sees itself as the major party representing precisely this center. In terms of the right-left orientation of its voters, the 2018 Populism Barometer shows that the party's position remains almost unchanged at 5.38, slightly to the right of the average (4.86). More significant changes can be seen, however, in the populism of its voters: this is in fact rising slightly more than the average rise across the electorate.

The gradually increasing populism of the CDU/CSU electorate can also be seen in voting intentions: compared with the previous year, the party has lost support in the segment of non-populists, where it is strongest overall – its support in this segment may not have collapsed, but it has noticeably sunk. This should be a very clear message for the CDU/CSU: with more populism, it would surrender its brand essence as the strongest political force in the non-populist traditional center, without winning back the rightwing populist margin which has been lost to the AfD. It would run the risk of losing its identity as a non-populist mainstream party to the Greens. The CDU/CSU is already being squeezed from both sides by the rightwing populist AfD and the increasingly non-populist Greens, who are moving from the left-liberal center into the traditional center. Thus, if it passively accepts or even actively encourages the further growth of populism in its own ranks, this will be a highly risky strategy for the CDU/CSU, with very uncertain results.

SPD: holding steady at an average level of populism

The voters of the SPD may not be a bastion against rampant populism, but they are standing firm. Their populism remains at an average level. The SPD therefore has a noticeably flat profile when it comes to populism. Its electoral results are not particularly differentiated by populist tendencies. The party receives about the same amount of support from non-populist and from populist voters. Its voter profile has, at any rate, a much clearer shape on the left-right axis than it does on the populism axis.

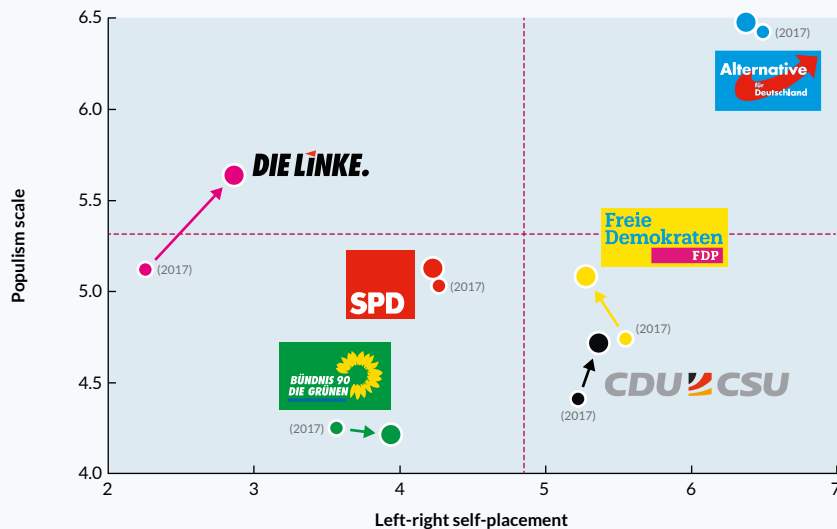
With its approval rates clearly decreasing overall, the SPD therefore faces the challenge of catering both to its more populist and to its non-populist groups of voters. At the moment, this balancing act is increasingly wearing the party down.

AfD: populism and the rightwing margin

The AfD is a different story: no other party has such an extremely contoured profile of populism. And no other party is ideologically so far to the right, according to the self-placement of its voters. At 6.49 on the populism scale and 6.38 in terms of rightwing orientation, the AfD is a perfect example of a rightwing populist party. Nothing has changed about this since the federal elections in 2017. At the far-right margin of the populists in Germany, the AfD receives 70 percent support, which means that seven out of ten rightwing populists vote AfD.

Party voters by populism and left-right orientation

Significant changes since 2017 are represented by arrows.



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

Target population: German citizens eligible to vote in 2018 (sample size: 3,427).

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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Among non-populist voters, the AfD receives much less support. Left of the center, almost no non-populist voter opts for the AfD. Only to the right of the center does the AfD also begin to pick up non-populist voters. In the far-right spectrum, its distinctly rightwing ideological orientation dominates among non-populist voters as well. Thus, the AfD still reaches around 30 percent on average among very rightwing non-populists.

The Greens: non-populist left-liberalism as a brand identity

In the German party-political landscape, the Greens are developing into the non-populist leader slightly to the left of the center. Already at the time of the federal elections in 2017, its electorate showed a generally non-populist profile, and now the Greens are markedly below average on the populism scale at 4.20 (-0.04). At the same time, the voters of the Green party have shifted ideologically towards the center. The party may not have swung to the right, but it has moved significantly towards the political center.

The non-populist leftwing center is therefore becoming the new unique selling point and brand essence of the Greens. The party's generally higher approval levels, which have risen markedly, are also due above all to increasing approval from non-populist voters. Here the Greens now achieve up to 25 percent: the more non-populist voters are, the more likely they are to vote Green.

Die Linke: populist temptation on the leftwing margins

In contrast with the Greens, the Left party is unwilling or unable to resist the temptation of a more strongly populist orientation. Its voters have changed significantly since the federal elections of 2017 in terms of their populist tendencies and their ideological position: in the 2018 Populism Barometer, they have shown themselves to be both more populist and also slightly less leftwing than in the previous year. Still, in 2018 they remain much less populist than the voters of the AfD.

Die Linke shows a similar tendency to the CDU/CSU and the FDP in terms of its reaction to the populist challenge presented by the AfD: it seeks and evidently finds further voter support above all in the more populist segments of the electorate. In contrast with the CDU/CSU and the FDP, Die Linke seems overall to have benefited from this, so far. At any rate, it has gathered more support since last year. Whether a more populist direction will continue to be worth it for Die Linke in future, remains in question. This party, too, is running a risk: it is jeopardizing the support of leftwing non-populists, who may be fewer in comparison with the populist voters of Die Linke, but who remain a vital group which is somewhat overrepresented among party members and officials.

FDP: increasing populism in the traditional center

The voters of the FDP also show more marked populist tendencies in 2018 than in election year. In terms of the right-left orientation of its voters, however, the FDP remains slightly right of the ideological center, almost in the same position as the CDU/CSU. In the overall picture, the FDP's electorate also has a comparatively flat profile of populism, and therefore both populist and explicitly non-populist voters opt for the FDP. Like the SPD, the FDP would be taking a risk by becoming more populist, and would endanger its non-populist core of mainstream voters slightly to the right of the center.

But which topics and standpoints could the parties use to bridge the gap, in order to connect with non-populist voters just as much as populist voters, and to mobilize them equally?

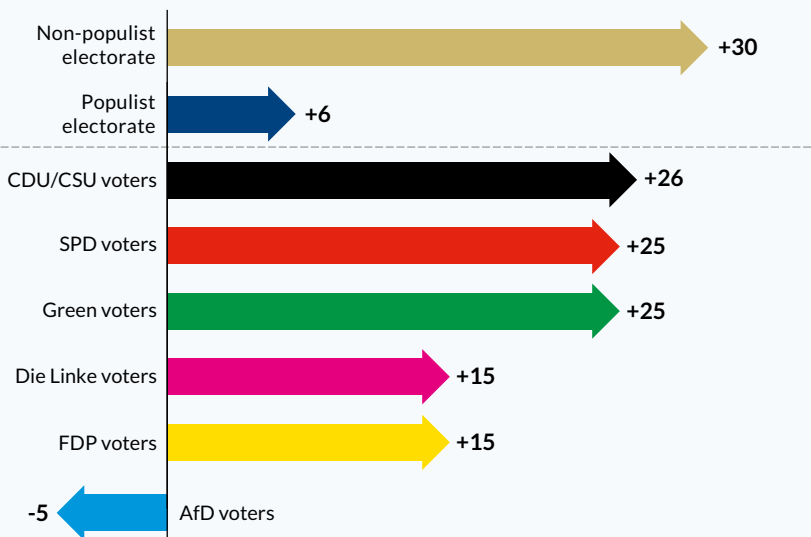
“More Europe” as a missed opportunity for mobilization

One example is European policy: “more Europe” wins support! No other topic currently has such a high positive potential for mobilization as the call for more cooperation in the European Union (EU). Across all voters on average, the call for “stronger cooperation within the EU” compared with “withdrawal from the EU” raises a candidate’s approval rates by 18 percentage points. Among non-populist voters, it raises them by almost 30 percentage points. Even among populist voters, candidates can improve their approval rates slightly with “more Europe”. The strongest gain in support would be in the camp of the CDU/CSU, closely followed by the SPD and the Greens. Die Linke and the FDP could also profit from a “more Europe” program, albeit to a much lesser extent. The only exception remains the AfD, with a slightly negative effect.

The overall picture shows: “more Europe” is a strong and positive opportunity for mobilization, above all in the non-populist camp of voters, without the risk of a negative counter-mobilization from the populist camp. Already in the federal election of 2017, the failure of all parties to make use of an explicitly pro-European campaign meant a missed opportunity for positive mobilization, and an example of serious negligence. Above all probably for the SPD and their candidate for chancellor, Martin Schulz. This remains the same today. “More Europe” would

“More Europe” as a missed opportunity for mobilization

Rise in support for a candidate who supports “stronger cooperation within the EU”...



Mobilization effect in percentage points
Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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still be a recipe for success in terms of non-populist voter mobilization – without the same risk of a counter-mobilization as there is on the issue of refugees. Someone just has to be brave. With “more Europe”, elections can be won in Germany, too – not just in France!

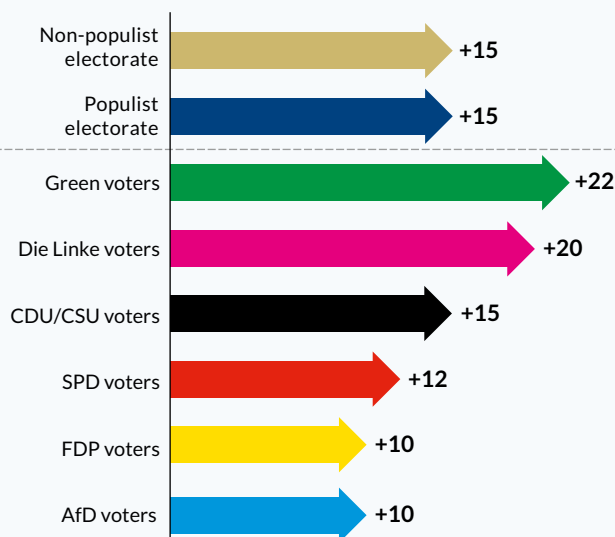
“More social housing” as a new opportunity for mobilization

The 2018 Populism Barometer analyzed housing policy for the first time. And the example of the call for “more social housing” allows us to demonstrate the strong mobilizing capacity of social policy issues, reaching far into the populist segments of the German electorate. For the striking and politically interesting point here is that on the topic of social housing, the populist and non-populist camps agree almost entirely. The call for “much higher investment in social housing” raises support among populists and non-populists by 15 percentage points in each group.

That means: with the social policy issue “more social housing”, the parties have the chance to address people across the camps, and to mobilize voters. With more efforts around social housing, as with other social policy topics, populists and non-populists can be mobilized and won over to an equal extent. A chance which the mainstream parties should use before the populists take it.

“More social housing” as a new opportunity for mobilization

Rise in support for a candidate who supports “much higher investment in social housing” ...



Mobilization effect in percentage points
Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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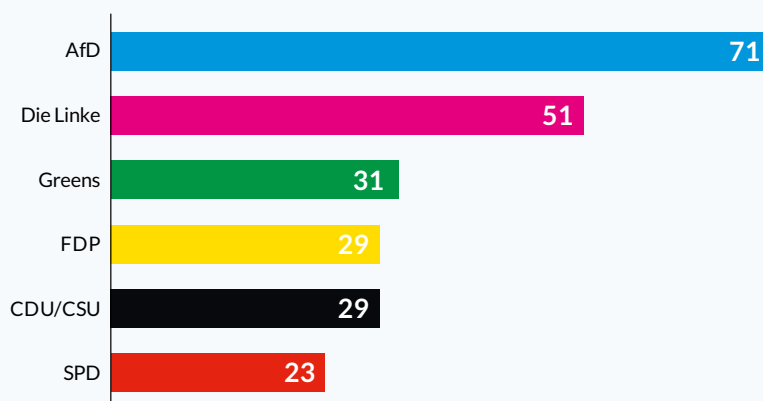
No alternative for Germany

In party-political terms, it is currently above all the political margins which are benefiting from the increasing populism of voters. To some extent, this applies to Die Linke on the left margin, and it is much more strongly the case for the AfD on the rightwing margin. This is shown by their results at elections and in surveys, where they seem to be growing continuously. What is often overlooked here, however, is the fact the AfD is rejected among the very great majority of the electorate at least as strongly as it is supported by its voters. This is shown by the negative voting intentions of the German electorate, which were collected for the first time by the 2018 Populism Barometer.

Thus, 71 percent of the electorate in Germany would “definitely not” vote for the AfD. More than seven out of ten of those eligible to vote therefore clearly reject the AfD. The other parties all meet with a much lower level of rejection. Only Die Linke is somewhat closer to the AfD, with 51 percent, but this is still very far below the rejection levels of the AfD. No other party is rejected to the same extent as the AfD by voters. With this massive rejection from voters, it stands at about the same level as the rightwing extremist NPD. For the overwhelming majority of all voters, the AfD is unelectable. Thus, when it comes to the AfD and voter mobilization, there is something like a “glass ceiling” – and that ceiling is much lower and much thicker than it is for any of the other parties represented in the Bundestag.

No alternative for Germany

Negative voting intention (“would definitely not vote for the party”) as a percentage of the electorate



Target population: German citizens eligible to vote in 2018 (sample size: 3,323).

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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Drawing conclusions: do we need a new “anti-populism”?

Up to now, the current efforts by the mainstream parties to stem the flow of rightwing populism from the AfD have been a failure. The findings of the 2018 Populism Barometer also confirm that: populist attitudes remain widespread and are even increasing in extent and intensity, especially in the political center. It is mainly the AfD which profits from this.

But what does this mean when it comes to dealing with the AfD and the growth of rightwing populism in Germany? Do the mainstream parties need more populism? Or should they opt for a new “anti-populist” strategy? And if so, how might that look?

First of all: the growth of populism in a democracy is always a symptom. It is never successful without a reason. It has causes. Even in Germany!

But one thing is equally clear: we cannot fight fire with fire. Fighting populism with more populism brings with it the danger, at the very least, of adding to the problem rather than solving it.

Any “anti-populism” therefore has to be based on recognizing and combating its actual causes. And those lie deeper than is obvious from the populist symptoms alone. Social divisions, the disintegration and segmentation of society, new cultural and social divides, and the still unfinished process of German Reunification, these are just a few of the key words. Others relate to the state of democracy itself: the erosion of the major parties, gaps in representation and deficits in responsiveness, and an increasingly self-referential cosmopolitan elitist discourse which more or less rejects communitarian values and problem-solving strategies. Populists evidently have no answers or solutions of their own to these problems. But they benefit as long as that is also the case for the mainstream parties.

Successful “anti-populism” therefore has to find new solutions which build bridges and overcome the divides. For this, it is essential to recognize and reduce existing gaps in responsiveness. More social justice is at the center of that, along with overcoming social and cultural divisions, as is also shown by the findings of the Populism Barometer. But as necessary as such a change in politics may be, it is still not enough on its own. “Anti-populism” also has to be “popular” in itself, it has to speak to people, it has to reach them in their language, it has to meet them in their everyday lives and respect them, and it has to decrease the distance which has emerged between mainstream politics and citizens. For that, “anti-populism” does not have to be populist. But it must be “popular”, otherwise it will not win any of the democratic majorities which it very much needs in order to bring about change.

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
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"/>
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"/>
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"/>
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"/>
Important questions should not be decided by parliament but by popular referendums.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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"/>
The people in Germany agree, on principle, about what should happen politically.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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
in the German electorate in 2018

The overall political climate in Germany is becoming more populist. The extent and intensity of populist attitudes are increasing. Especially in the political center: there is no other segment of the electorate in which the creeping advance of populism is so clearly visible.

More than three in ten (30.4 percent) of the electorate currently hold populist views. That is around 4 percent more than in the previous year. At the same time, the fraction of voters who are explicitly non-populist has decreased by just over 11 percent. A large part of this increase in populist attitudes can be explained by an increasingly populist political center. Around one in eight of the electorate (12.7 percent) currently have populist attitudes and are also positioned in the political center. That represents an increase of just over 14 percent in comparison with the previous year. At the same time, the proportion of those voters who are at least “partly” populist has risen by almost a quarter, and the percentage of those who are non-populist has sunk by just over a fifth. Furthermore, the intensity of populist attitudes has seen an above-average rise in the political center.

The distribution of populist attitudes remains – as in the previous year – socially divided: the lower the level of formal education and income, the greater the proportion of those with populist attitudes. Because voter turnout likewise remains socially divided in today’s Germany, non-voters are more likely to be populist than voters.

The Populism Barometer also shows that many respondents overstate their populism. They express themselves in a more populist manner than would correspond to their “real” attitudes. That, too, points to an increasingly populist climate in Germany. Populism is becoming more popular. Expressing oneself in a populist way seems, to many people, to be “socially desirable” behavior.

Populism in Germany does remain “moderate” in its form. German populists may support the system of democracy, but they are exceedingly dissatisfied with the ways in which it works. Their illiberal understanding of democracy makes even “moderate” populists a challenge for liberal democracy.

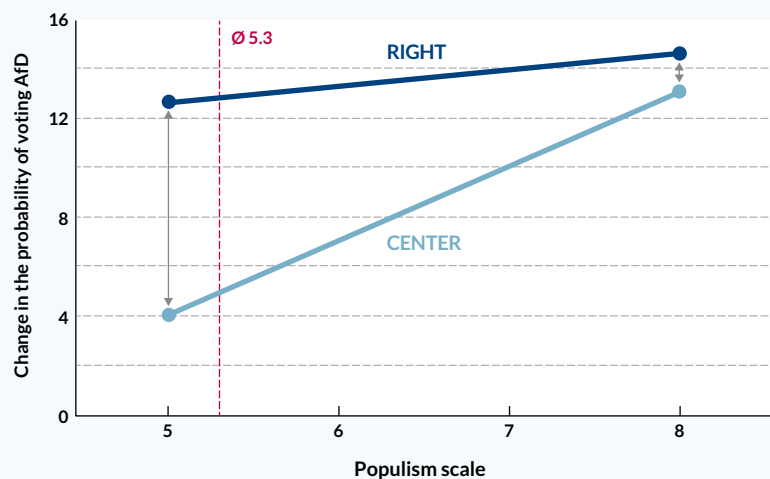
IN FOCUS

Populist mobilization in the center

Intensifying populism in the political center is the most worrying key result of the 2018 Populism Barometer. The extent and intensity of populist attitudes have, in comparison with the election year 2017, further increased significantly in the political center. This has not been a landslide, but an insidious process. Nevertheless: this is a noticeable increase, without an in-built brake, and without the guarantee that populists have already used up their potential to gather support in the center – especially as the AfD has established itself at least for now as a party which actively fans the flames of this centrist populism as a strategy to win voters. And not without success, as the results of the 2018 Populism Barometer show: on the one hand, the numerous supporters of the AfD on the far-right vote for the party above all because it can clearly be seen as ideologically rightwing. However, the AfD's recipe for success in the political center is its pronounced populism. This can be seen from the following illustration of the increase in people intending to vote for the AfD in the rightwing spectrum and in the political center, each plotted against populist tendencies.

The populist mobilization of the center

Changes in the probability of voting for the AfD, according to voters' level of populism in the political center and on the right (in percentage points)



Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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The analysis shows: the change in the probability of voting AfD is noticeably greater with increasing populism in the center than it is among rightwing voters for the AfD. While the increased probability of voting AfD is around 4 percentage points just left of the average populist tendency, it triples with the increasing populism of voters in the political center, to 13 percentage points. Meanwhile, the distance dwindles between the rightwing voters of the AfD and those in the center, from around 9 percentage points for those voters who are less populist than average, to just 2 percentage points for those who are very populist.

It is still the case that those on the right vote AfD much more often than those in the center. But in the center, the pronounced populism of the AfD has a greater mobilizing capacity than it does in the rightwing spectrum. The pronounced populism of the AfD takes on, in the political center, a similar mobilizing function to its markedly rightwing positioning among its supporters on the right and the far right. These aspects work together to create the electoral results of an exemplary rightwing populist party, which reaches more than two thirds of all voters in the rightwing populist segment.

“Populism is the Trojan horse of the AfD in the political center.”

Summarized and simplified: right-wingers vote AfD because it is rightwing. Voters in the center vote AfD because it is populist. Populism is therefore the Trojan horse of the AfD in the political center. If populism rises in the center, the chances of mobilization are higher for the AfD. If the mainstream parties try to emulate the populism of the AfD, this also raises, above all, the chances of the AfD to increase its power, because it mainly adds to the acceptability and salience of populist positions, and those voters who are mobilized by populism then prefer the original, at least at the moment. That was the strategic error of the CSU in summer 2018 (cf. EINWURF 3/2018 “Preisgabe der Mitte”, Policy Brief of the Bertelsmann Stiftung).

Thus, all that remains for the mainstream parties is to uncover the actual causes of populism and fight them actively: through clever policies and a clear position coupled with the aspiration of educating the political center about the dangers of populism for democracy and stopping the rising populism of the center. Currently, it is mainly the Greens who are demonstrating how this might be done (cf. chapter 3 of this study).

What is populism?

Populism seems to be emerging as the hallmark of twenty-first-century democracy. Since the election of Donald Trump, Brexit, and the rise of rightwing and leftwing populist movements even in many Western democracies, there is 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 democracy research, leading to numerous new publications and to greater research efforts. This has made it possible 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) – though without reaching 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 is faced 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 measuring concepts are used by the Populism Barometer introduced here, in order to detect how populist the Germans are?

Populism today 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 2018) 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, populism can be, as a “thin ideology”, 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 the 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 of, at least, 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 allowing 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 defined through 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 of which 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.









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

How populist are the Germans according to these criteria? How “radical” or “moderate” is their populism, how much do they connect it with leftwing or rightwing ideologies?

In the Populism Barometer, the level of populist attitudes is operationalized and measured according to agreement 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			
		strongly agree	mostly agree	mostly disagree	strongly disagree
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"/>
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"/>
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"/>
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"/>
Important questions should not be decided by parliament but by popular referendums.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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"/>
The people in Germany agree, on principle, about what should happen politically.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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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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. 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.

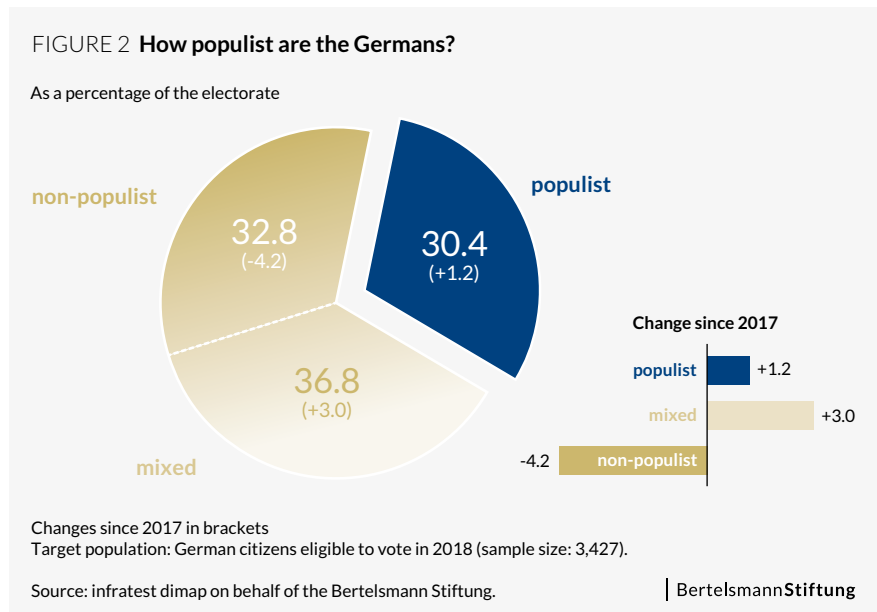
The same interdependence also goes for the eight items which relate to the three dimensions of populism: thus, for instance, the wish for more referendums (item 5) is not yet populist in itself. But the demand for more direct democracy becomes populist when it is combined with the anti-pluralist fiction 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 level of their populist views, we also measured the ideological orientation of the respondents. 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 2018? How populist are the Germans, and how has that changed since the federal elections in 2017? Have the Germans become more non-populist or more populist? And how “moderate” or “radical” is their populism? Does the populist 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?

Populist attitudes remain widespread and are increasing

Already in the election year 2017, populist attitudes were widespread in Germany. Since the federal election, this has further intensified: more than three in ten eligible voters in Germany (30.4 percent) hold populist views. That is around 4 percent or 1.2 percentage points more than in the previous year (29.2 percent). At the same time, the share of non-populist voters has decreased by just over 11 percent or 4.2 percentage points from 36.9 to 32.8 percent. More than a third (36.8 percent) of the electorate cannot be placed in either of the two groups, and is thus neither explicitly populist nor explicitly non-populist. This group of “mixed” voters has grown since the previous year by just over 9 percent or 3 percentage points.



Two developments play a particular role here: on the one hand, evidently it has been increasingly possible to activate latent populist attitudes in the population. For in Germany, as in other countries, populism is not simply governed by trends. Populist attitudes of many voters show themselves to be stable across time. Their political convictions are ingrained and firmly anchored. They can be used for populist ends, but they do not have to be generated by populist movements and parties in the first place. To activate them, however, a catalyst is necessary. In Germany, before the federal elections of 2013, that trigger was the euro crisis, and from autumn 2015, to a much larger extent, the refugee crisis. The AfD therefore did not have to start by inventing the populism of many voters in Germany, but simply used anti-migrant and xenophobic resentments, in particular, to activate it.

On the other hand, the Populism Barometer also shows that populism in Germany is continuing to grow. Populist attitudes are increasing in their extent and their intensity. The increase of around 4 percent may seem small, but is statistically noticeable and very unlikely to be coincidence. The trend becomes even clearer given that the proportion of entirely non-populist voters has sunk by more than a tenth.

But it is not only the share of voters with populist attitudes which has risen. The intensity of populist attitudes has increased too. Compared with last year, the average tendency towards populism across the electorate on a scale from "0" (non-populist) to "8" (populist) has climbed by 0.22 scale points to 5.31. This may also seem marginal at first, but proves to be a statistically significant change and points to an increasingly populist electorate in Germany.

However, at the same time: more than two thirds of all German voters are not populist, or at least not explicitly. The changes in comparison with the previous year should, however, be warning enough not to see that as being set in stone, or to take it for granted. The overall political climate in Germany has, in any case, become more populist. That is also shown by the following results on the social desirability of populist attitudes.

Populist attitudes are becoming more “popular”

Experimental survey results from the Populism Barometer show that populist attitudes are overstated by a section of the respondents (Neuner and Wratil 2017, Vehrkamp and Wratil 2017). Their “true” populism is thus significantly weaker than the “expressive” populism which they show openly in surveys. That can be interpreted as an indication of the social acceptance and desirability of populist views. These are exaggerated in surveys because they are seen as “socially desirable” and thus make the respondents, in their own self-perception, “look good”. In order to correspond to the apparently populist mainstream climate, many people express themselves in surveys as being more populist than their “true” convictions would demand.

In the 2018 Populism Barometer, this overreporting effect stands at 17 percentage points. That is the size of the difference between agreement with populist statements in the open survey and the actual attitudes of the respondents:

FIGURE 3 Popular populism – social desirability of populist attitudes

In percentage points

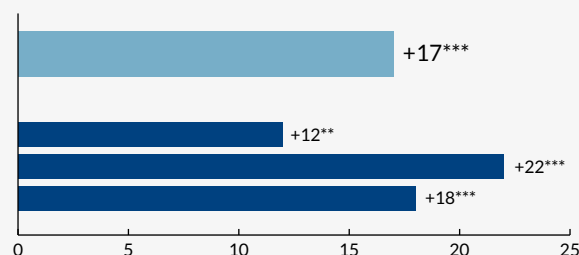
All eligible voters

Educational attainment

Min. A levels/high-school diploma

Mid-level secondary school leaving certificate

Max. lower-level secondary school leaving certificate



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 on a dummy variable for “treatment list”; statistical significance of the difference is based on “difference-in-means” test; * $p < 0.1$; ** $p < 0.05$; *** $p < 0.01$.

Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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Compared with the previous year, this shows that overreporting of populism has tended to increase, which allows us to draw conclusions about the social desirability of populist attitudes: these are becoming increasingly popular in Germany. More and more people regard them not just as socially acceptable, but as being actually desirable. Expressing oneself in a populist way about politics, politicians and democracy is evidently “in” – people feel comfortable doing so in the mainstream of the social and political climate.

A further interesting change in this overreporting effect compared with the previous year can be found in how it differs according to education. While the overreporting effect in the previous year mainly applied to those with a higher level of formal education, it has now spread across all three educational groups: those with the lowest formal education exaggerate their populism by 18 percentage

points, those with a mid-level of education by 22 percentage points and those with the highest level of formal education by 12 percentage points.

From the survey research into social desirability, it is known that deliberate exaggeration of socially desirable views and deliberate underplaying of socially undesirable attitudes in surveys is most commonly a strategic behavior of the more educated sections of society. That has been shown, for instance, in surveys on voter turnout (Bernstein et al. 2001; Holbrook and Krosnick 2010; Silver et al. 1986) and on migration (Janus 2010). It is the well-educated who are most likely to perceive the connotations of social desirability and who are therefore likely to answer strategically, while people with a lower level of education are more honest about revealing their true attitudes. In the 2018 Populism Barometer, even the respondents with the lowest level of formal education exaggerate when it comes to their populist attitudes: a fact which can be seen as a further indication of an increasingly populist overall climate in Germany. The assumption that populist attitudes will be “popular” has become a shared truth in general opinion. It increasingly seems to be a matter of course that populist remarks about politicians, parties and democracy are “socially desirable”.

The growing populism of the political center

Although we began by defining populism independently of an ideological left-right orientation, in public discourse there is often talk of “rightwing populism”, “leftwing populism” or “the populism of the political center”.

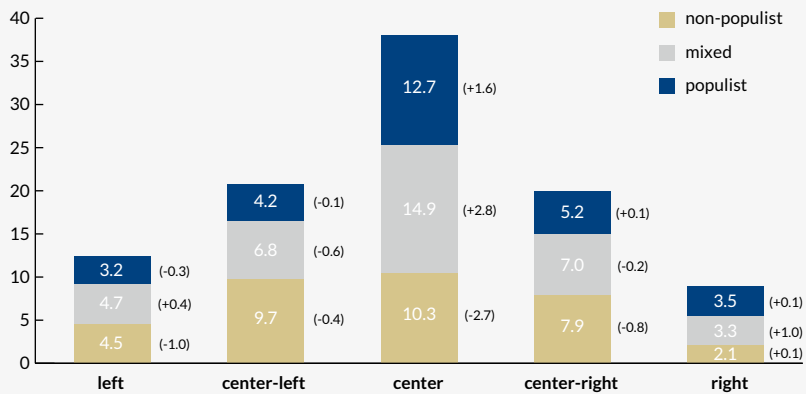
But how does one differentiate populist attitudes according to the ideological orientation of those who hold them? And how does that play out among the German electorate? Are those with populist attitudes more likely to be “leftwing”, “rightwing”, or to come from the political “center”?

One way of answering this question is to use respondents’ own estimates of their position on a left-right scale, which they can use to locate their personal standpoint between 0 (left) and 10 (right). In order to simplify the possible relationships, we divide these self-placements into five groups: positions on the left-right scale at 0, 1 and 2 are “left”, at 3 and 4 are “center-left”, 5 is “center”, 6 and 7 are “center-right”, and 8, 9 and 10 are “right”. Now we can analyze how many respondents in the different categories are populist or non-populist. First of all, figure 4 shows the left-right distribution of the whole electorate and the changes measured in comparison with the previous year.

This shows once again that populism is not exclusively a phenomenon of the political margins. On the contrary – the greatest number of populists place themselves in the political center. Around one in eight of those eligible to vote (12.7 percent) are currently populists and at the same time count themselves as part of the political center. Last year, this was still around one in nine (11.1 percent). The increase in populist attitudes is thus concentrated very strongly in the political center. Or in other words: the growing populism of the center explains a large part of the increase in populist views in the electorate as a whole. The growing populism of the center is intensified by the fact that the proportion of explicitly non-populist voters is decreasing (–2.7 percentage points), while the share of those who are at least “mixed” (+2.8 percentage points) is also growing.

FIGURE 4 Populism and left-right orientation I

As a percentage of the electorate



Changes since 2017 in brackets

Target population: German citizens eligible to vote in 2018 (sample size: 3,427).

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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But it is not just that the number of populist voters has grown, particularly in the political center. It is also that the average level of populism has, in the political center, increased more significantly than in the average of the whole electorate. Among voters in the center, this tendency towards populism on a scale from 0 (non-populist) to 8 (populist) grew by 0.31 scale points or almost 6 percent to 5.57. Among all those eligible to vote, this increase came to 5.31, with 0.22 scale points or just over 4 percent, which means that it was somewhat smaller.

In contrast with the growing populism of the center, the proportions of populists on the left and right of the center remained constant to a large extent. Thus, on both sides, we find almost identically large proportions of center-left or leftwing populists (7.4 percent) and center-right or rightwing populists (8.7 percent), which are generally unchanged compared with the previous year. The proportions of populists who are decidedly leftwing (3.2 percent) and decidedly rightwing (3.5 percent) also remain almost unchanged and about the same size as each other.

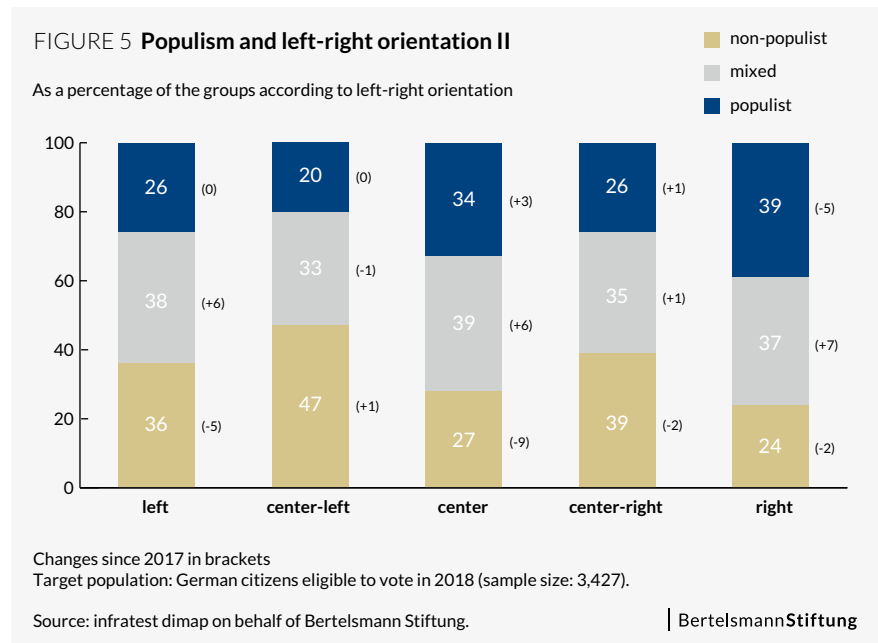
Nevertheless: in the political center, we find not only the largest number of populists, but also the largest number of explicitly non-populist people: around one in ten (10.3 percent) are completely non-populist, whilst just under 15 percent are at least partly non-populist. Thus, just over a quarter of the electorate are non-populist voters in the political center.

But the warning signs remain: there is no segment of voters in the German electorate in which the increase in populism is as clear as it is in the political center.

However, if instead of looking at the proportions of all those eligible to vote, we look at the relative percentages of populist people in the various ideological groups, we can fill out the picture from another perspective, and complete it.

Rightwing populism dominates

The relative proportions show that populist voters occupy a noticeably greater share of the politically rightwing spectrum than the leftwing spectrum or the political center:



Whilst in the political center, one in three people are populists (34 percent), on the far left this only applies to one in four (26 percent). To the far right of the spectrum, meanwhile, four in ten (39 percent) of those eligible to vote can be described as populists. At the same time, the proportion of non-populist people on the right of the spectrum is, at just under a quarter (24 percent), still much smaller than the proportion of non-populists at the far left (36 percent). However, this difference has shrunk noticeably since the previous year, because the far left of the spectrum has also seen a very clear reduction in non-populists (5 percentage points) since the previous year. However, this decrease is even more striking in the political center: there, the proportion of explicitly non-populist voters has collapsed from 36 to 27 percent. In comparison with the previous year, this is the greatest change in any individual segment of the ideological spectrum of voters, and further evidence of the intensifying populism of the center.

The disproportionate frequency of populist attitudes on the right of the spectrum, which becomes clear when we see the full picture, can also be seen in the self-placement of populists overall on the left-right scale, which is slightly to the right. Whilst non-populists position themselves on average at 4.7, and therefore slightly to the left of the average of the whole electorate (4.9), this value is 5.1 for populists, and thus somewhat to the right of the average. Even these differences, which seem numerically small, prove to be statistically noticeable and confirm the tendency that populist attitudes in Germany are more often connected with rightwing than with leftwing ideological orientations.

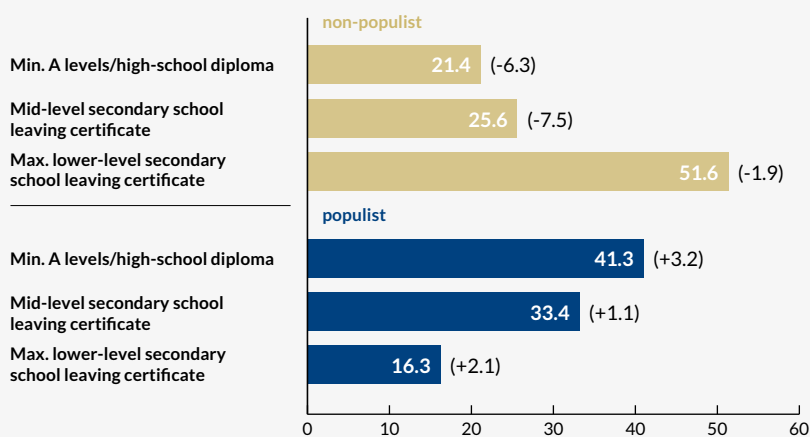
Socially divided populism

If we analyze the social profile of people with populist attitudes, a very unambiguous finding emerges in comparison with the group of non-populist voters: populism in Germany is socially divided. The lower the level of formal education and income, the more populist people are, and the higher the level of formal education and income, the greater the proportion of people with entirely non-populist attitudes. Meanwhile, age and gender do not make any clear difference, or only a much smaller difference.

The tendency towards populism is differentiated most strongly according to education. Compared with the previous year, these differences have noticeably increased.

FIGURE 6 Populism by educational attainment

As a percentage of group



Changes since 2017 in brackets

Target population: German citizens eligible to vote in 2018 (sample size: 3,427).

Source: infratest dimap on behalf of Bertelsmann Stiftung.

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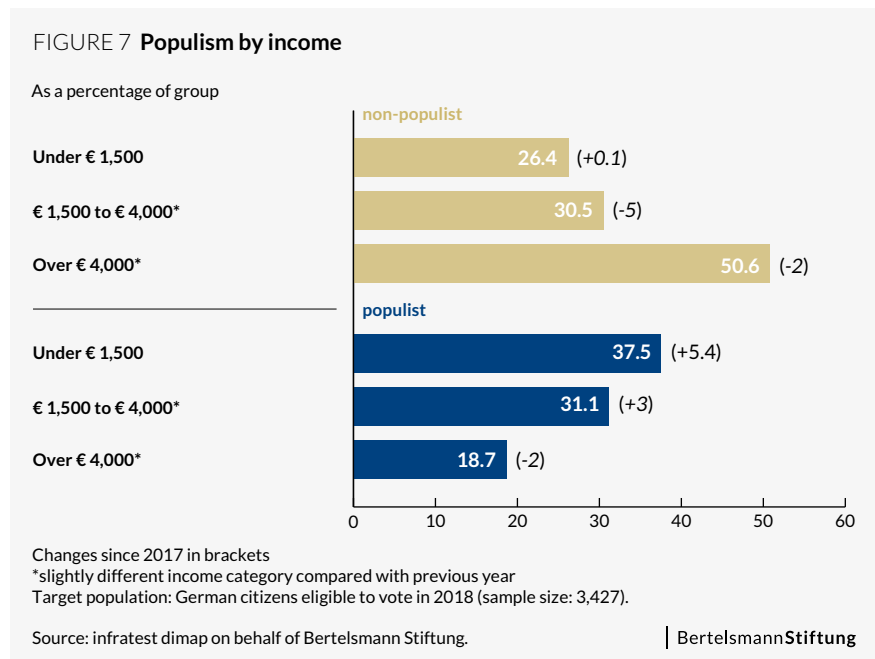
This trend is particularly clear among the generally decreasing shares of non-populist voters at all three levels of education. Whilst in the group with the highest level of formal education, the reduction to 51.6 percent only amounted to 1.9 percentage points, the proportion of non-populist voters in the mid-level of education sank by 7.5 percentage points to just 25.6 percent, and at the lowest level it decreased by 6.3 percentage points to just 21.4 percent. In the two lower groups, the proportion of non-populist voters is therefore not even half as high as it is among the formally well-educated. The differences in the proportion of populists is even greater: in the group of those with the lowest formal education, 41.3 percent or more than two and a half times as many people have populist views than in the group of the highly educated (16.3 percent).

A similar picture emerges when it comes to the average strength of populism in the three groups: whilst the highly educated have a mean value of 4.57 scale points and are therefore well below the average across the electorate, the two

lower educational groups, with 5.57 (mid-level) and 5.77 (lowest level) are much more populist than average.

Populism in Germany is therefore also a question of education. A higher level of education is more likely to protect against populist views, making more education a powerful weapon against growing populism. This applies particularly to political education. As a reduced understanding and a false concept of democracy, populism therefore requires education and a better understanding of the functioning and prerequisites of liberal democracy and its institutions. Or, to cite Ralf Dahrendorf once again: “Populism is simple. Democracy is complex.” (Translated from German; 2003, p. 159).

A similarly socially divided picture also emerges when the various income groups are compared. Here, too, the higher the income, the higher the proportion of non-populist people, and the lower the income, the higher the proportion of populist attitudes:



Whilst in the highest income group, slightly more than half of respondents (50.6 percent) are explicitly non-populist, this proportion is only about half the size in the lowest income group (26.4 percent). This is mirrored in the share of populists in the lowest income group, which at 37.5 percent is roughly double as large as in the group with the highest income (18.7 percent).

The greatest changes in comparison with the previous year once again relate to the income in the middle of society. Even if we can only make limited comparisons with the previous year, because the middle income group in the 2018 survey encompasses incomes up to 4,000 euros (2017: up to 3,500 euros), the trend is clear and rather tends to be understated by the slightly different income classes: the share of populist voters in the middle has risen by about 3 percent, and the share of explicitly non-populist people in the middle has sunk by about 5 percent.

This means that income is another area in which the growing populism of the “center” is visible.

Thus, in 2018, the overall picture which emerges continues to be one of a socially divided populism in Germany: the lower the level of formal education, and the lower the income, the greater the proportion of people with populist attitudes. The higher the level of formal education, and the higher the income, the greater the proportion of non-populist people. Like voter turnout (as shown in previous studies by the Bertelsmann Stiftung such as “Gespaltene Demokratie” and “Prekäre Wahlen”), populism in Germany is deeply socially divided.

Non-voters are more populist than voters

Populist attitudes tend to be widespread among people whose attitude to the established institutions and processes of liberal democracy is characterized by distance and rejection. Parties, parliaments and elections are rejected wholesale. Voter abstention is a typical pattern of reaction and behavior for populists, as long as there is no explicitly populist option for them at the ballot boxes. That is why non-voters, even independently of their social status, are more often populist than voters. However, their social profile clearly further intensifies this effect. This, too, is shown by the results of the 2018 Populism Barometer, which thus confirms last year’s findings.

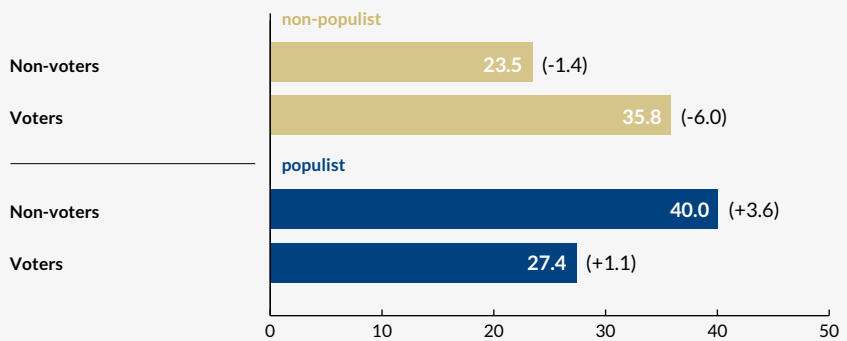
The data collected in the Populism Barometer is particularly meaningful on this subject, because a large proportion of our respondents were asked directly after the 2017 elections about their participation, and furthermore, many more non-voters were surveyed than is usually the case in comparable surveys. It is therefore very probable that the non-voter respondents really were people who chose not to take part in the 2017 elections, and were thus “real” non-voters. In addition, the comparatively large number of non-voters questioned also leads to results for this group which are qualitatively especially representative. First of all, the current numbers for 2018 confirm the finding that susceptibility to populism is much greater among non-voters than among voters. At the same time, however, resistance to the growing populism is also crumbling among many voters, which can be seen above all in the very visible reduction in the proportion of explicitly non-populist voters (see figure 8 on the next page).

Whilst four in ten non-voters (40 percent) have populist attitudes, this proportion among voters is only just over a quarter (27.4 percent). Compared with the previous year, this difference has even increased slightly, because the proportion of populists among non-voters has risen by 3.6 percentage points, but among voters by only 1.1 percentage points.

However, the changes in the proportion of explicitly non-populist voters give a different picture: the proportion of non-populists among voters has sunk by 6 percentage points, much more than among non-voters (-1.4 percentage points). The proportion of non-populists among voters does remain noticeably larger, at 35.8 percent, than among non-voters (23.5 percent). However, it is clear that resistance to populism among voters is no longer so much greater than it is among non-voters.

FIGURE 8 Populism among voters and non-voters

As a percentage of group



Changes since 2017 in brackets

Target population: German citizens eligible to vote in 2018 (sample size: 3,427).

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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In interpreting these numbers, it is important to take account of voter migration, which is not directly measurable. Its tendencies are known from other election polls, and allow the following conclusions to be drawn: the above-average success of the rightwing populist AfD in mobilizing non-voters (Vehrkamp and Wegschaider 2017) is one possible explanation for the growing proportion of populist voters. Because voter participation has grown overall, this can also explain part of the proportional decline of explicitly non-populist voters (= base effect). It may seem surprising that among non-voters, in spite of the migration of many populist former non-voters to the camp of the AfD, the proportion of populists has risen so noticeably. However, a plausible explanation for this is the overall greater susceptibility of non-voters to populism, which allows the AfD not only to mobilize voters in this camp, but also to use its populist campaigns to make the non-voter camp even more populist than it already was. In order to prevent that, the mainstream parties need to develop explicit non-voter strategies. Otherwise they are surrendering the non-voter camp to the AfD without a struggle (Vehrkamp et al. 2016).

Populists are “disappointed in democracy” – but which democracy do they mean?

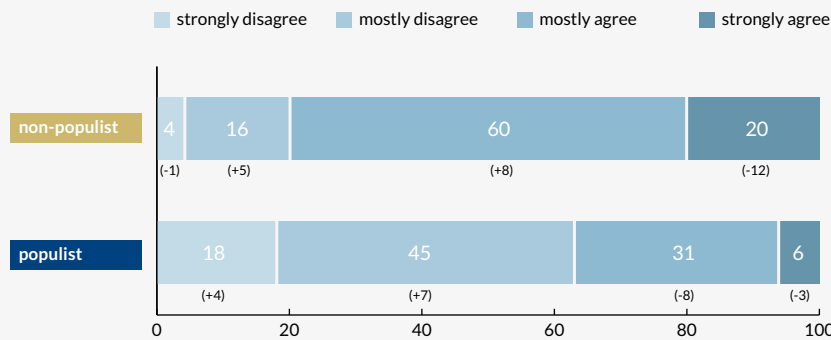
Populists present themselves in surveys as being disappointed in the functioning of democracy, but this does not mean that they reject democracy out of hand. This is also shown by the 2018 Populism Barometer: populists see themselves as “disappointed democrats”, but not as “enemies of democracy”.

This is clarified first of all by the answers to the question about satisfaction with how democracy currently functions in Germany (see figure 9).

In 2018, populists once again seem to be markedly less satisfied than non-populists. Their dissatisfaction has in fact risen further. Thus, even the arrival of the rightwing populist AfD in the German Bundestag has not done anything to

FIGURE 9 Satisfaction with the functioning of democracy...

As a percentage of group



Changes since 2017 in brackets

Target population: German citizens eligible to vote in 2018 (sample size: 3,427).

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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lessen that dissatisfaction. By now, almost two thirds of all populists in Germany are either completely (18 percent) or somewhat (45 percent) dissatisfied with the functioning of democracy. Only 6 percent (-3 percentage points) are fully satisfied, and fewer than one in three (-8 percentage points) are at least somewhat satisfied with how democracy is working.

As in last year's survey, non-populist voters are much more satisfied with democracy in Germany. However, that satisfaction is also becoming much less enthusiastic: only every fifth non-populist (20 percent) is fully satisfied, which means a reduction of about a third compared with the previous year (-12 percentage points). This is not (yet) a sign of explicit dissatisfaction, but above all gives the disturbing sense of a waning satisfaction, because it is still the case that more than eight in ten non-populists "mostly" or "strongly agree" with the statement (80 percent). This proportion has barely changed since the previous year (-3 percentage points).

Still, the overall picture remains of an insidious growth in dissatisfaction with the functioning of democracy in both camps. The arrival of the populist AfD in the Bundestag and the greater polarization of the political discourse which accompanied it have in any case not brought more satisfaction with the functioning of democracy, but have led this satisfaction to continue to crumble.

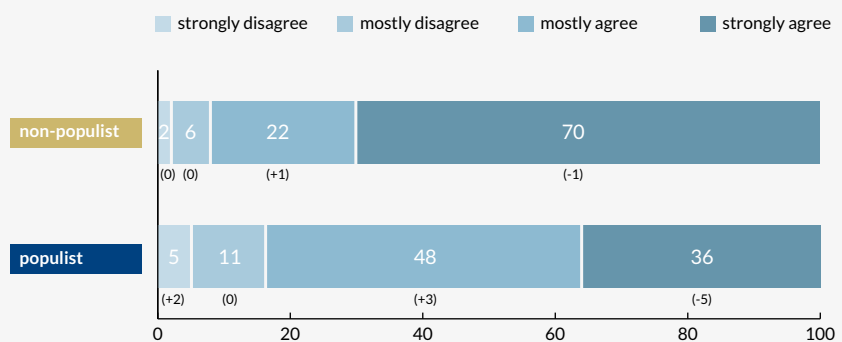
A much more stable picture emerges when it comes to support for democracy as "the best political system". On the one hand, here, too, populists are somewhat less enthusiastic than non-populists. But the differences with regard to support for democracy are much smaller than they are for satisfaction with the system.

Altogether, there is a high level of approval for democracy: regardless of their populist leanings, the vast majority of people support democracy as a system. This goes for 92 percent of non-populists and 84 percent of populists. Even in the populist group, in 2018 only a vanishingly small minority (5 percent) reject democracy as a system, though this has increased by 2 percentage points compared with

the previous year. Among the non-populists, this figure remains unchanged at 2 percent. The only obvious change is the sinking number of populists who support democracy without reservation. Only just over a third (36 percent) are prepared to do so, whereas in the previous year this figure was still 41 percent. At the same time, the number of those who mostly approve of democracy has risen by almost the same number of percentage points (+ 3 percentage points) to almost half (48 percent) of all respondents in this group. That points to a shrinking enthusiasm for democracy among populists, but not to a collapse in support or a swing towards a rejection of the system on principle.

FIGURE 10 Approval of democracy as best system...

As a percentage of group



Changes since 2017 in brackets

Target population: German citizens eligible to vote in 2018 (sample size: 3,427).

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

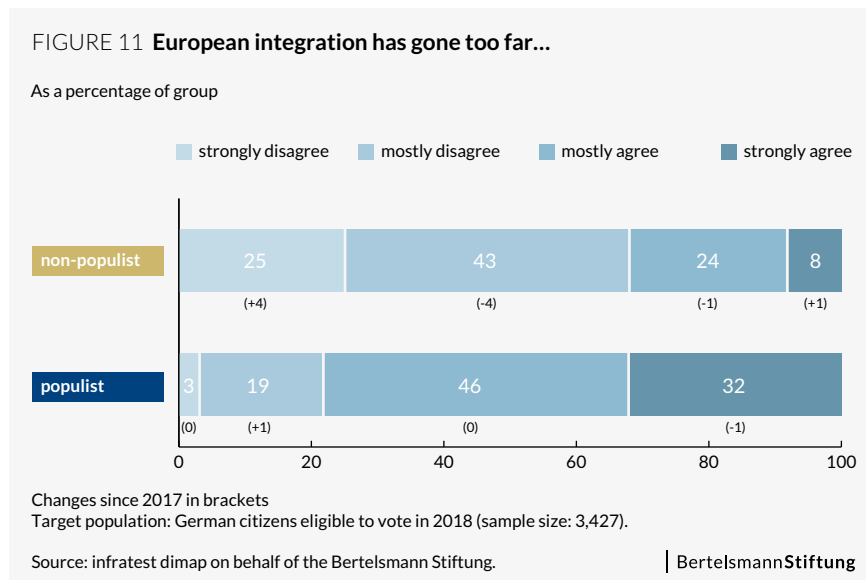
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Even so, we must be careful when interpreting these numbers: we did not ask about a particular form of democracy, but quite generally about the “system of democracy”. Respondents can, then, base their answer to this question on their subjective understanding of democracy. And that is defined quite differently by populists and by non-populists. Populists have a distorted picture of democracy, which partly even contradicts the principles of liberal democracy. In particular, the dimension of populism which comes under the heading of “anti-pluralism” paves the way for anti-democratic aspirations. Likewise, there is the populist fiction of a will of the people which is both unified and plain to see, and which, in case of doubt, should take precedence over the processes, norms and institutions of liberal democracy: this contradicts basic democratic convictions. Because populists therefore have a different, distorted and partly illiberal understanding of democracy, their support for democracy as a system must be interpreted with at least a certain caution. The democracy which populists have in mind could thus reveal itself to be illiberal in the context of liberal democratic values. This is a further reason for the mainstream parties to question the faith which populists say they have in democracy, and above all to demand that populist parties, in both words and actions, clearly commit themselves to the values, processes and institutions of the liberal democracy which is anchored in the constitution.

Populists are “disappointed in Europe” – but which “Europe” do they mean?

The pattern of satisfaction versus support for democracy is mirrored when it comes to satisfaction with the functioning of European integration and approval on principle for Germany’s membership of the European Union (EU). A large majority of populists are of the opinion that European integration has gone too far. However, a similarly large majority still support Germany’s EU membership. Thus, they may see themselves as “disappointed Europeans”, but still also as “supporters of Europe”. But which “Europe” do they mean? And is their idea of Europe still compatible with the values, norms, institutions and processes of liberal democracy in Europe?

First of all, the results of the 2018 Populism Barometer seem to draw an unambiguous picture:



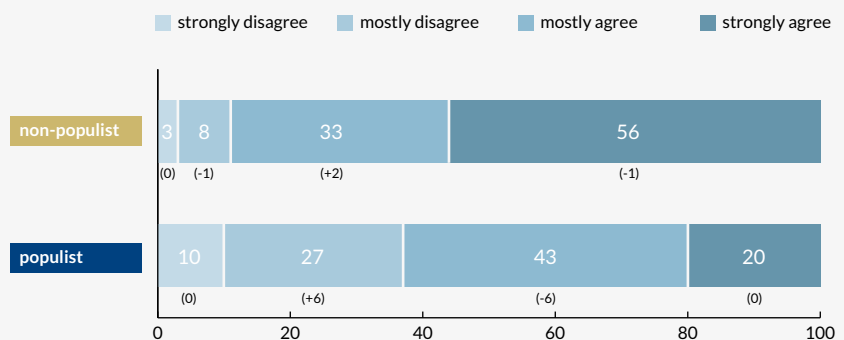
While almost eight out of ten populists regard the current level of European integration as excessive, only just under a third (32 percent) of non-populists take this view. This is mirrored in the fact that almost seven out of ten non-populists either “mostly disagree” (43 percent) or even “strongly disagree” (25 percent) with the notion that EU integration has gone too far. Among populists, only about one in five (22 percent) take this view. For populists, then, in 2018, European integration remains excessive. But does that mean they reject the EU?

This question, too, can seemingly be answered clearly using the current data of the 2018 Populism Barometer: no, dissatisfaction with integration does not automatically lead populists to reject EU membership. Their approval may be much less enthusiastic than it is among non-populists. But even populists in Germany explicitly do not see themselves as enemies of the EU. Almost two thirds of all populist respondents approve of Germany’s membership in the EU either “strongly” (20 percent) or at least “mostly” (43 percent; see figure 12 on the next page). These

approval rates have deteriorated slightly since the previous year (-6 percentage points). But still, a majority of almost two thirds of populists do support Germany's membership in the EU. Among non-populist respondents, approval stands at 89 percent over all, and a clear majority of 56 percent even support the EU "strongly":

FIGURE 12 Approval of membership in the European Union...

As a percentage of group



Target population: German citizens eligible to vote in 2018 (sample size: 3,427).

Source: infratest dimap on behalf of Bertelsmann Stiftung.

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Thus, across the populist and non-populist camps, there is very clearly an awareness of the advantages of EU membership, and this has remained stable over time. Still, the question remains of which Europe the populist critics of current EU integration are referring to. What do they mean by their almost unanimous agreement with the claim that European integration has gone too far? What is behind this: the wish for reform, or the wish for a different, populist Europe? In any case, when interpreting the high approval rates for EU membership, which are good news in themselves, we cannot ignore the sweeping criticism of the current level of integration. The Europe of such people as Viktor Orbán would certainly look different from the liberal and democratic EU of today, and would endanger the values, norms, institutions and processes of today's Europe. In the light of their understanding of democracy, when populists support "Europe", they probably mean something quite different from the great majority of non-populist supporters of Europe.

How "moderate" is populism in Germany – and how dangerous is "moderate" populism for democracy?

That leads us once again, at the end of the chapter, to the more fundamental question of whether there can be such a thing as "moderate" populism, and how dangerous it is for liberal democracy to be faced with a populism which is "moderate", at least in its own eyes.

Radical populists quite openly demand that the ruling politicians be stripped of power, in order to strengthen the influence of the "true" will of the people, which

they see themselves as embodying. It is here that the marks of authoritarianism are discernible, which are revealed above all once populists hold power in government.

Moderate populists, meanwhile, see themselves rather as a corrective to democracy. They advocate far-reaching reforms of the political system and criticize mainstream parties and politicians. They even see themselves as the better democrats, because in their own view they make democracy more responsive, closer to citizens, and therefore more democratic. But is this self-image compatible with the defining attributes of populism? Is it possible to be a good democrat while understanding direct democracy only as the enforcement of a fictive will of the people which is anyway already fixed, and which has been foiled by a corrupt elite? While regarding democratic compromise, which is essentially the lifeblood of liberal democracy, as a betrayal of one's own principles? Or while seriously taking the view that the parties in a democracy do not even care about the interests of their voters?

Already from these questions, it is clear that caution is needed before we regard populism as harmless just because it initially claims to be "moderate". In any case, even so-called "moderate" populism is at least a latent danger to liberal democracy. The growing populism in Germany, especially in the political center, does generally express itself in "moderate" terms – but that does not mean we should be too hasty in sounding the all-clear.

2. The populism debate

Issues and positions driving populist and non-populist voter mobilization in 2018

What do voters care about in 2018? Which topics motivate them, and how does this differ for non-populist and populist voters?

In 2018, it continues to be positions on “Europe”, “redistribution” and “migration” which have the greatest effect on electoral chances. Social questions, in particular, have taken on more meaning. This also bridges the political camps: more social policy and more redistribution of wealth raise approval levels among populist and non-populist voters.

An example of this is European policy: “more Europe” wins support! No other issue currently has a similarly positive potential for mobilization than the demand for stronger cooperation within the European Union (EU). On average across all voters, the demand for “greater cooperation within the EU” rather than “leaving the EU” raises the approval rates of a candidate by 18 percentage points. Among non-populist voters, it raises approval rates by almost 30 percentage points.

For the first time, the 2018 Populism Barometer analyzed housing policy. The example of the demand for “more social housing” illustrates the strong mobilizing potential of social policy topics, which reaches far into the populist segments of the German electorate. Thus, it is striking that on the issue of social housing, there is almost complete agreement across the populist and non-populist camps: the demand for “much greater investment in social housing” raises approval rates equally among populists and non-populists, by 15 percentage points.

That means: with the sociopolitical redistribution topic of “more social housing”, the parties have the chance to address people and motivate them across the camps. With greater efforts in the area of social housing, it is possible – as with other issues concerning social policy redistribution too – to mobilize and win over both populists and non-populists to the same extent. The mainstream parties should use this chance, before the populists do.

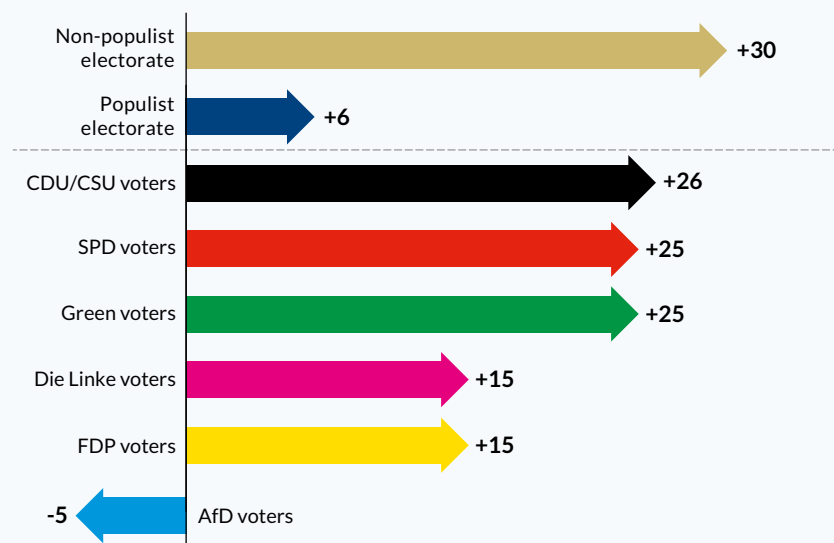
IN FOCUS

“More Europe” wins support!

“More Europe” wins support: no other topic currently has such a high positive potential for mobilization within the European Union (EU). On average across all voters, the demand for “stronger cooperation within the EU” as opposed to “leaving the EU” raises the approval rates of a candidate by 18 percentage points. Among non-populist voters, it even increases approval rates by 30 percentage points. Even among populist voters, candidates can improve their approval rates slightly (+6 percentage points) with “more Europe”. That shows: “more Europe” is an enormously positive mobilization opportunity above all in the camp of non-populist voters, without the danger of a negative counter-mobilization from the populist camp. That goes for all parties – except for the AfD.

“More Europe” as a missed opportunity for mobilization

Rise in support for a candidate who supports “stronger cooperation within the EU”...



Mobilization effect in percentage points
Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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The strongest gain in approval would be in the camp of the CDU/CSU voters (+26 percentage points), followed closely by the SPD (+25 percentage points) and the Greens (+25 percentage points). Die Linke (+15 percentage points) and the FDP (+15 percentage points) could also benefit from a decisively pro-European program, but to a much smaller extent. In the case of Die Linke, that may be caused by its growing share of populist voters, and for the FDP, it could be due to the fact that one wing of the party continues to take a fundamentally critical view of the euro bail-out.

Only the voters of the AfD would be decidedly unimpressed by a pro-European program, and would punish such a candidate slightly. AfD voters thus emerge as even more critical of Europe than the average of all populists in Germany – an obvious legacy of their founding phase as an anti-euro party.

The results of the 2018 Populism Barometer confirm and continue the results from the federal election campaign of 2017 (Vehrkamp and Wratil 2017). Here, too, the fact that all parties decided against running an explicitly pro-European campaign was downright irresponsible and a missed opportunity for positive mobilization, above all for the SPD and their candidate for chancellor, Martin Schulz. Nothing has changed on this front. Still, the mainstream parties in Germany are hesitating to follow the French President Macron, for example, on his path towards a decisive deepening of European integration, or even to go ahead with their own suggestions – probably for fear of an anti-European counter-mobilization of the populists. The shock from the founding phase of the anti-euro AfD still seems to have paralyzed the mainstream parties.

“More Europe can win votes in Germany, too – not just in France.”

At the same time, the experience of dealing with the influx of refugees is evidently being projected onto Europe. And this despite the fact that our results show very clearly: there is no need to fear a counter-mobilization which would be comparable with the backlash against refugees. Most populist voters would either take a somewhat positive view or at least be indifferent towards further EU integration. In any case, the anxiety of the mainstream parties when it comes to Europe proves to be exaggerated and unjustified. “More Europe” would be a recipe for success when it comes to mobilizing non-populist voters. Someone just has to be brave. “More Europe” can win votes in Germany, too – not just in France!

Which issues and positions determine voting behavior?

So far, our analysis has shown: populist attitudes are widespread in today's German electorate and are on the rise. 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 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). 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 able at all to perceive their own weighting and prioritization of competing topics and positions, and to express them accurately in surveys?

In order to avoid such a potential bias, 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. 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 then 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 2018?

For the 2018 Populism Barometer, this method was used to ascertain 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 standpoints were formulated. The conjoint method then calculates the influence of a particular standpoint on the likelihood 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 "basis position" on that topic.

For the issue of "Europe", for example, the "basis 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 just 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. Alongside the eight policy areas which form the focus here, the same method was used to analyze twelve further individual positions on a range of issues, for each of which only one standpoint was formulated.

The results for the whole electorate are summarized in figure 13. Additionally, figure 14 gives an overview of the results for populist voters in comparison with non-populist voters (see next page).

The positive and negative effects of individual positions on voter decisions are shown by the deviation 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 by representing, instead of the relevant "basis position", 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 wider the lines of the confidence intervals, the less certain is that score. Furthermore, only when the lines do not cross the line of zero 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 or an error. 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.

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

FIGURE 13 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 investment 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

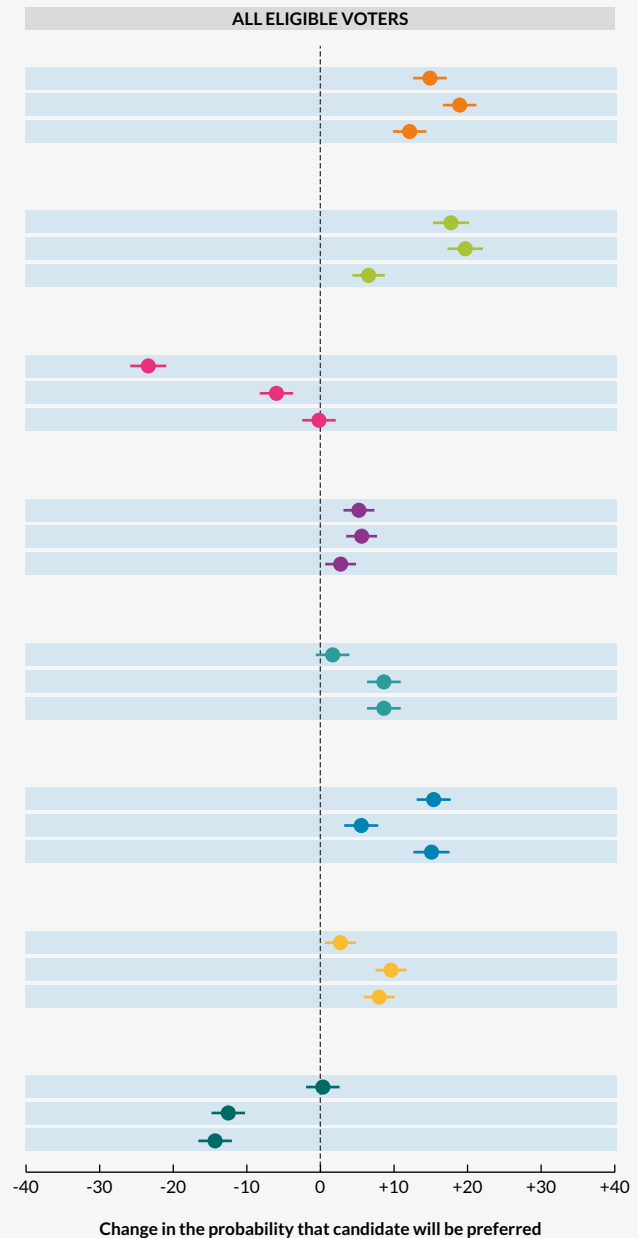
(Baseline: Supports much higher duties on foreign goods and services)

- 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; probability changes refer to comparison with the baseline category. Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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FIGURE 14 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 investment 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

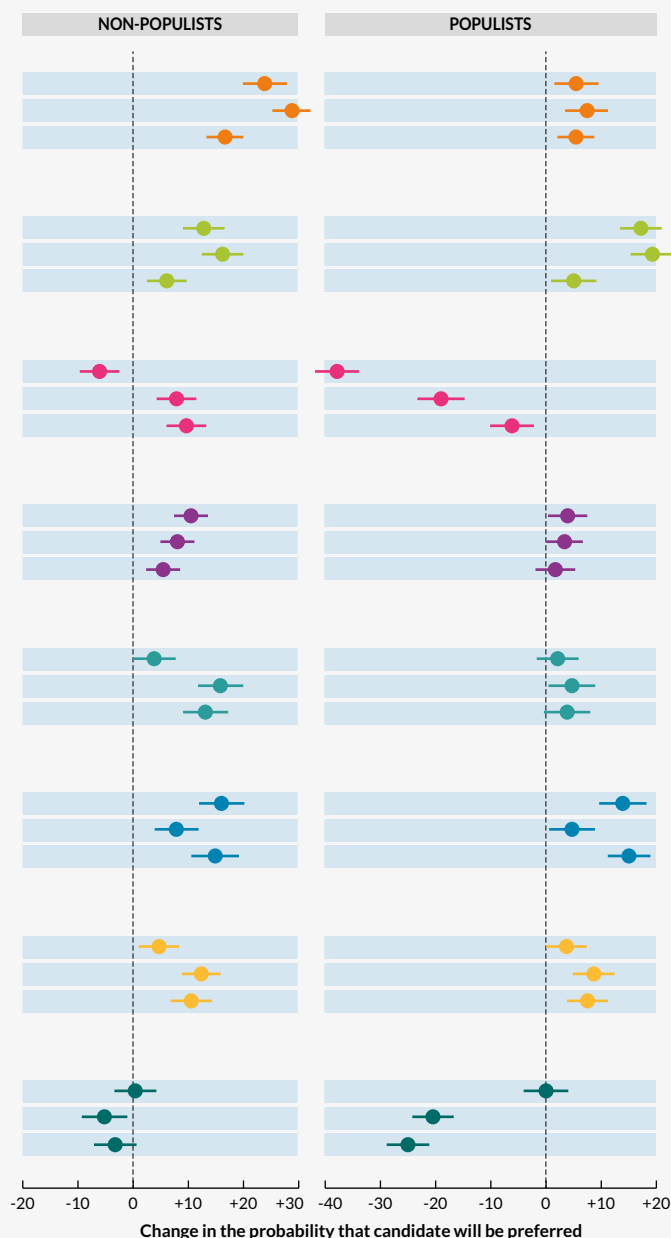
(Baseline: Supports much higher duties on foreign goods and services)

- 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; probability changes refer to comparison with the baseline category. Target population: German citizens eligible to vote in 2018.

Source: infratest dimap 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 2018 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. Finally, we will take from the individual focal points the radical populist demand for a removal of power from political elites, looking at it more closely as an indicator of moderate and radical populism. This results in a sophisticated picture of the issues which influence voters in 2018. This allows us to discover which topics politicians and parties could pick up on in which ways, in order to raise their approval rates.

European integration: “more Europe” wins support!

When it comes to Europe, the great continuity in the results is what strikes us first: as in the election year 2017, Europe remains an important concern for voters in Germany, with positive associations and a strong influence on voting choices. Thus, in 2018, it continues to be the case: “more Europe” mobilizes voters! In comparison with other topics and positions, barely any other subject has such a strong positive mobilizing effect as further European integration, right up to the expansion of the EU into a common state. This also means in reverse: demanding to leave the EU does not meet with any approval in Germany, but with rejection from a large part of the electorate. Such a demand would therefore have a long-term negative influence on the electoral results of a candidate on average across the electorate.

FIGURE 15 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

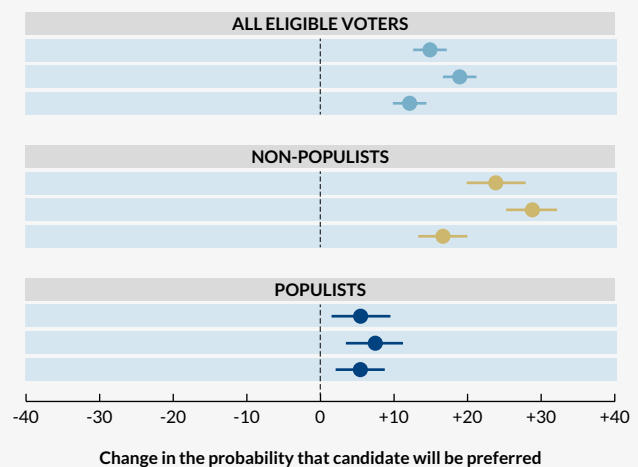
POSITION ON THE EU

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

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

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

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



Method: "Average marginal component effects" (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; probability changes refer to comparison with the baseline category.
Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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In comparison with a withdrawal from the EU, the call for greater cooperation in the EU raises approval rates by 18 percentage points. The development of the EU into a common state (+14 percentage points) and even the demand for weaker cooperation within the EU (+12 percentage points) are clearly preferred by voters to the call for withdrawal.

The resistance of this basic pro-European attitude among German voters can also be seen if we consider the following: if we were to choose, rather than Germany's exit from the EU, the demand for less cooperation within the EU as a baseline, a candidate could still secure better approval rates by 7 percentage points by opting for stronger cooperation instead. Correspondingly, candidates who speak out for a withdrawal from the EU instead of just less cooperation would damage their approval rates by 12 percentage points.

This clearly pro-European attitude is even more visible in the segment of non-populist voters: here, increased integration would even raise approval rates by around 27 percentage points. No other standpoint influences non-populist voters in Germany more strongly than the future of the EU. No other topic can mobilize voters more strongly in this segment and gather more support than the positive vision of "more Europe". "More Europe" would therefore be, in Germany, the issue most suited to a general and non-populist mobilization of voters. Nevertheless, in the election year 2017 and since then, the mainstream parties have avoided this topic or at least not made much use of it as a campaign issue. Why not?

Is it because the parties are afraid of a populist counter-mobilization on the topic of Europe? Is it because they see themselves as being more pro-European than the average of the electorate and they therefore see a convincing pro-European campaign as a risk?

The results of the Populism Barometer show very clearly that such fears and reservations are unjustified: even populist voters in Germany are aware of the value of the EU. They may be more indifferent towards EU topics, which are not particularly relevant to their voting choices. But even among populist voters, the parties can benefit from pro-European positions and improve their approval rates by 4 to 6 percentage points. This is mirrored by the fact that a demand for Germany's exit from the EU would also cost them support among populists and, even more importantly, would not bring about any populist mobilization effect. The situation when it comes to European policy is therefore completely different from the issues of migration and refugees.

To sum up once again: "more Europe" mobilizes voters and creates, particularly among non-populist voters, far higher approval rates. "Less Europe" damages approval rates even among populists in Germany. The strengthening (and improvement) of European cooperation therefore remains a missed opportunity for mobilization in Germany, especially for the mainstream parties (see the focus analysis on p. 44).

The future of the eurozone: no need to fear the euro

A similar pattern emerges when it comes to the euro and the future of the eurozone. Here, too, it is often speculated that German voters are cautious, skeptical or even disapproving. Here, too, the mainstream parties are careful about presenting pro-European visions for the future of the eurozone. They value “German” interests more highly than the common “European” interests of all countries in the eurozone, and they are afraid of a populist anti-euro mood and the counter-mobilizing force of this at election time.

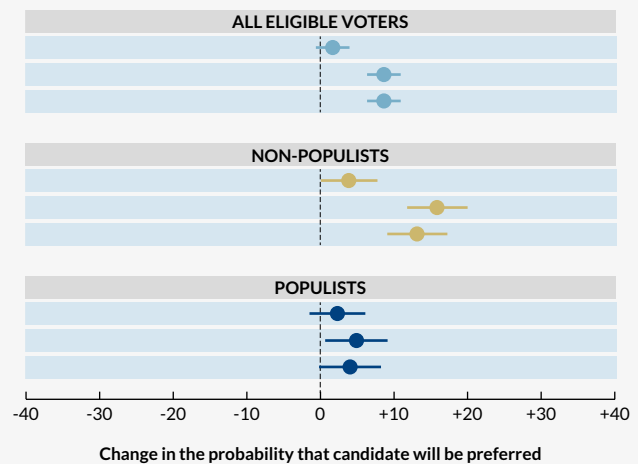
FIGURE 16 The influence of positions and priorities on the eurozone on the probability of candidate selection across the electorate and among non-populist and populist voters

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



Method: “Average marginal component effects” (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; probability changes refer to comparison with the baseline category. Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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These fears prove to be similarly groundless in the light of the results of the Populism Barometer, and reflect the fact that the parties are afraid of being boldly pro-European. Because not only when it comes to the overall perspective of the European Union, but also in terms of the concrete future of the eurozone, voters in Germany are actually both brave and pro-European.

Across all voters, approval rates rise with a “higher” or even “much higher” level of cooperation within the eurozone by about 8 percentage points. Correspondingly, calls for a “lower” or even “much lower” level of cooperation within the eurozone would significantly damage approval rates, by just under 10 percentage points. Thus, voters do respond slightly more cautiously overall to the specific topic of the euro than to the more general EU standpoints. However, the pro-European pattern is still very visible here, and ought to motivate politicians in Germany to position themselves clearly in discussions of the eurozone’s future, and to make their pro-European stance known to voters.

On the euro, too, this is particularly the case for the non-populist camp of voters. They approve of the expansion of cooperation within the eurozone almost as strongly, at 17 percentage points, as the whole electorate approves of increased cooperation in the EU as a whole. After the EU, the future of the euro is one of the topics which influence all voters the most, especially non-populists. Here, too, we can say: “more euro” mobilizes voters and raises approval rates, “less euro” demobilizes them and lowers the chances of winning votes.

The fear of a populist counter-mobilization is just as unjustified when it comes to the euro as it is on the more general topic of the EU. For one thing, the euro is currently not a very relevant topic for populists. Its influence on their voting choices is only small. Still, greater cooperation would even be appreciated by populists in Germany (+3 percentage points), whereas the dangers of a populist counter-mobilization are rather low.

In summary, this means: not just “more Europe”, but also “more euro” mobilizes voters and raises the chance of winning votes in Germany more than it damages it.

Migration and refugees: controls rather than deportation!

On the subject of migration and refugees, too, opinions have remained roughly the same compared with the election year 2017. Barely any other question influences the Germans as much as this one. And opinions continue to follow the same pattern, “controls rather than deportation”, which remains stable in comparison with the previous year.

However, when we consider the details, at least two notable changes emerge: firstly, the idea of accepting further refugees now meets with even more rejection, and secondly, even the call to admit some new refugees is now enough to damage approval rates across the average of all voters significantly. That points to a further intensification in the climate of discussion when it comes to the arrival of refugees. At any rate, this year politicians have still not succeeded in settling this topic or at least containing it.

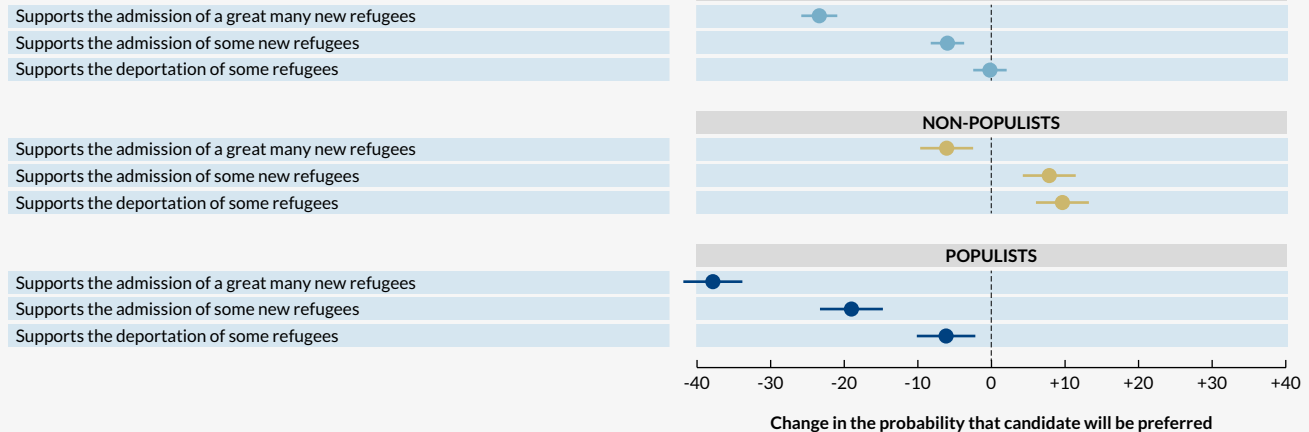
The call for the “deportation of a great many refugees” raises approval rates across the electorate in comparison with the “admission of a great many new refugees” by around 24 percentage points (see figure 17 on the next page). In the election year 2017, this margin was still at around 20 percentage points. The topic has therefore even increased in significance. At the same time, it clearly remains the case in 2018 that approval rates will not decrease with a more moderate position on the question of deportation. In comparison with the call for the deportation of “a great many refugees”, the call for the deportation of “some refugees” does not lead to any additional loss of approval. In 2017, that was also the case for candidates calling for the admission of a few new refugees, but that has slightly changed in 2018. Now, the “admission of some new refugees” compared with the “deportation of a few refugees” leads to a further loss of approval of around 6 percentage points. If in the election year 2017 the main concern of the voters was to avoid taking in a great many new refugees, now even the admission of only some new refugees leads to further losses in support.

FIGURE 17 **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)



Method: "Average marginal component effects" (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; probability changes refer to comparison with the baseline category.
Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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However, this is mainly due to the extremely critical attitudes towards refugees among voters in the populist camp. Among populist voters, the admission of a great many new refugees leads to a loss of approval of almost 40 percentage points, and the admission of only some new refugees still corresponds to a loss of approval of almost 20 percentage points. Even the deportation of only some refugees is not enough for populist voters, and reduces approval rates in comparison with the populist call for the deportation of a great many refugees.

Among non-populist voters, the pattern of "controls rather than deportation" is even clearer than it is across the average of the whole electorate. Their objective is to avoid another increase in admitting a great many new refugees, and thus above all to control immigration, as opposed to stopping the intake altogether, let alone deporting as many refugees as possible. In order to garner approval from non-populist voters on the migration question, targeted controls on the flows of refugees are enough. Tougher demands, and more criticism of migration, do not lead to any further notable gain in approval.

Thus, the strong polarization between populist and non-populist voters with regard to the question of refugees not only remains, but has even intensified slightly. Politicians have obviously not succeeded in calming down the two sides on this question or mediating between the different positions. That is most probably due to the consistently sensationalist distortion of the topic by the rightwing populist AfD, which has continued to fuel the polarization. On the other hand, it may well also stem from the fact that numerous questions concerning immigration policy have still not been solved, and representatives of the mainstream parties in debate with the AfD partly emulate the AfD's own populist rhetoric.

and treatment of the topic. Above all, the conflicts on migration policy within the government and the weeks of arguments within the CDU/CSU have increased the salience of the topic and drawn attention to it, raising its potential to be sensationalized, preventing objective discussion and a calmer approach (Vehrkamp 2018).

Social housing: a new social question

For the first time, the 2018 Populism Barometer also analyzed housing policy. Hence, there is no comparison here with the previous year, but the results for 2018 are nevertheless extremely revealing: affordable homes and the future of social housing appear to be the new social question or at least a new and increasingly important facet of this question.

In comparison with “much lower” investment in social housing, the call for greater or much greater funds for social housing clearly increases approval rates across the whole electorate: by 15 percentage points for “much greater” investment and by 16 percentage points by “greater” investment. The average voter in Germany therefore wants visibly greater efforts from the state in this area. For politicians, this is therefore an important new issue of social justice and the distribution of wealth, which influences many voters and their voting choices.

What is striking and politically interesting about the issue of social housing is the almost complete agreement between voters in the populist and non-populist camps. The variation in approval rates turns out to be almost identical.

FIGURE 18 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

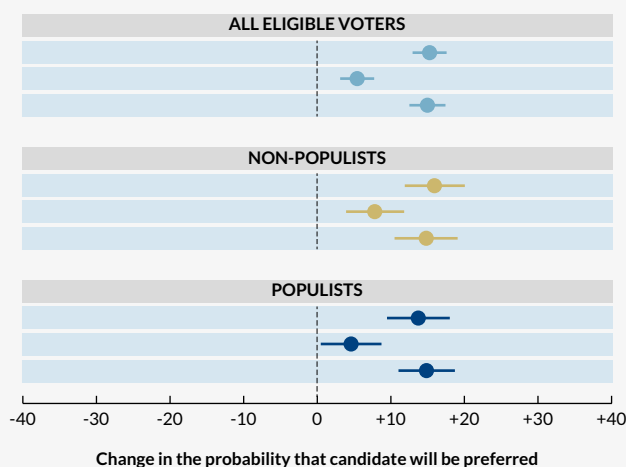
POSITION ON SOCIAL HOUSING

(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; probability changes refer to comparison with the baseline category. Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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That means: with the sociopolitical objective of promoting social housing, the parties have the chance to address voters across the political camps and to mobilize them. With greater efforts here, they can win over populists and non-populists to an equal extent. Social housing can therefore be an issue which builds bridges across a society which is developing in different directions in many other areas, and which is divided in many ways. A chance which should be used by the parties, and which is also connected with other questions of redistribution, such as tax policy.

Taxes: the wish for more redistribution

A similar pattern to the one found on social housing emerges for tax policy, which was the second issue explicitly related to (re)distribution which we examined in the 2018 Populism Barometer. Here, too, there is a consensus for more redistribution across the camps.

Across the electorate on average, the call for “much higher” or “somewhat higher” taxes on the rich leads to much better approval rates than “lower” or even “much lower” taxes on the rich. Higher taxes for high-income people would increase approval rates by 20 (“higher taxes”) or 18 percentage points (“much higher taxes”). Thus, on tax policy, a clear preference emerges on the part of voters for redistribution from the top down, which implicitly already showed itself in the wish for more state investment in social housing.

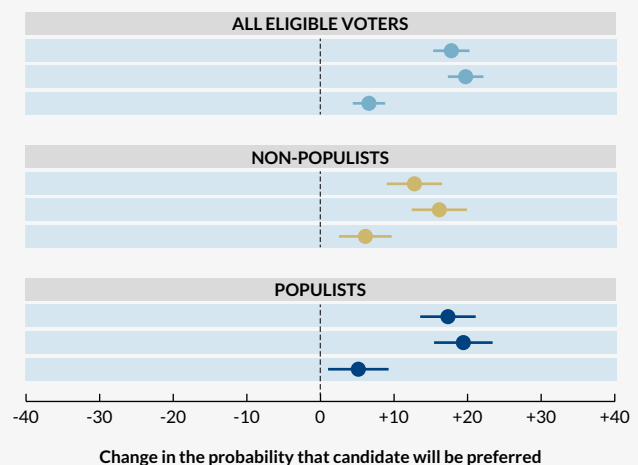
FIGURE 19 The influence of positions and priorities on taxes on the probability of candidate selection across the electorate and among non-populist and populist voters

In percentage points

POSITION ON TAXES

(Baseline: Supports much lower taxes on the rich)

Supports much higher taxes on the rich
Supports somewhat higher taxes on the rich
Supports somewhat 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
Supports much higher taxes on the rich
Supports somewhat higher taxes on the rich
Supports somewhat 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; probability changes refer to comparison with the baseline category.
Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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Likewise, in tax policy the approval patterns for populist and non-populist voters are almost entirely the same. Both prefer more redistribution. Here, too, it becomes evident that issues of (re)distribution clearly have the greatest chances for consensus and are particularly suited to building bridges between populist and non-populist voters.

In the populist camp, too, there is therefore a climate of opinion which is clearly shaped by social policy questions and by the issue of redistribution. The AfD already seems to anticipate that and is planning a new sociopolitical positioning for the coming year, and with that a sharpening of what has so far been a rather diffuse programmatic orientation in this area of policy. The program of the AfD, which is currently still put together from generally liberal and neoliberal standard phrases from the founding phase – for example in pension and housing policy – might be called into question in that process. If the AfD moved in the direction of more social policy and more redistribution, it would bring its program closer to its potential voters, who already have strong national and social leanings. At the same time, many members of the current leadership of the AfD would, if there were such a new direction in party policy, either have to give up the positions they have taken so far, or revise them. For the mainstream parties, this is therefore a chance to broaden the conflict with the AfD from the area of migration and refugees, which the AfD dominates, to the area of social policy.

Free trade: no need to fear globalization

In comparison with the issues of Europe, the euro and migration, free trade and globalization lead a shadowy existence in the soul of the German voter. The salience of the topic is at any rate much lower. Although the future of the German economy is fundamentally dependent on the future of free trade and globalization, the challenges and opportunities connected with that have comparatively little influence on German voters.

Nor has this been altered by Donald Trump's populism, which has called an end to the long-established dominance of consensus on free trade and globalization. Anxiety over new moves toward protectionism and an end to globalization has either not reached German voters at all or at least remains contained. At any rate, this is currently not a "hot topic".

Nevertheless, our survey shows that there is a basically positive attitude towards free trade and globalization, which has remained stable in comparison with the previous year. In 2018, too, German voters prefer positions supporting globalization to those which criticize it. But a corresponding call for "much more" (+5 percentage points) or "somewhat more" (+6 percentage points) free trade and globalization raises approval rates only by a comparatively small extent.

Nevertheless, German voters have become somewhat friendlier towards globalization, to the extent that both of the stances which are critical of globalization ("much less" and "somewhat less" free trade and globalization) now receive somewhat lower approval than the two pro-globalization positions ("much more" and "somewhat more" free trade and globalization). In the election year 2017, that was only the case for the call for "somewhat more" free trade and globalization.

FIGURE 20 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

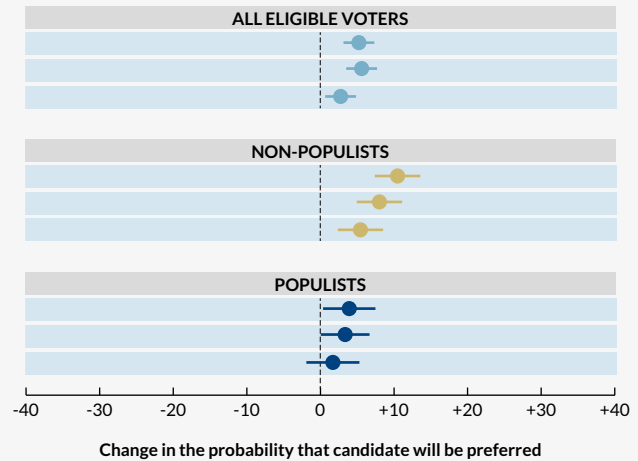
POSITION ON FREE TRADE AND GLOBALIZATION

(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; probability changes refer to comparison with the baseline category.
Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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It may also be reassuring for supporters of free trade and globalization that the preferences of populists show a very similar pattern on this topic to those of non-populist voters. Populists prefer free trade and globalization, just a bit less strongly than non-populists. It is still not currently a "hot topic" for populists, and is therefore not particularly important for voting choices. Thus, free trade and globalization in Germany are not issues which can easily be exploited by populists in election campaigns, against a general consensus which is pro-globalization. Similarly to the areas of the EU and the euro, this is not a topic which should cause the mainstream parties to fear that if they develop an explicitly pro-globalization stance they will be pilloried by populists, as in migration policy. Such an anti-globalization campaign would have much lower chances of success than an equivalent campaign on the refugee question. For the mainstream parties, then, the point remains: there is no need to fear globalization.

Customs policy: no chance for protectionism

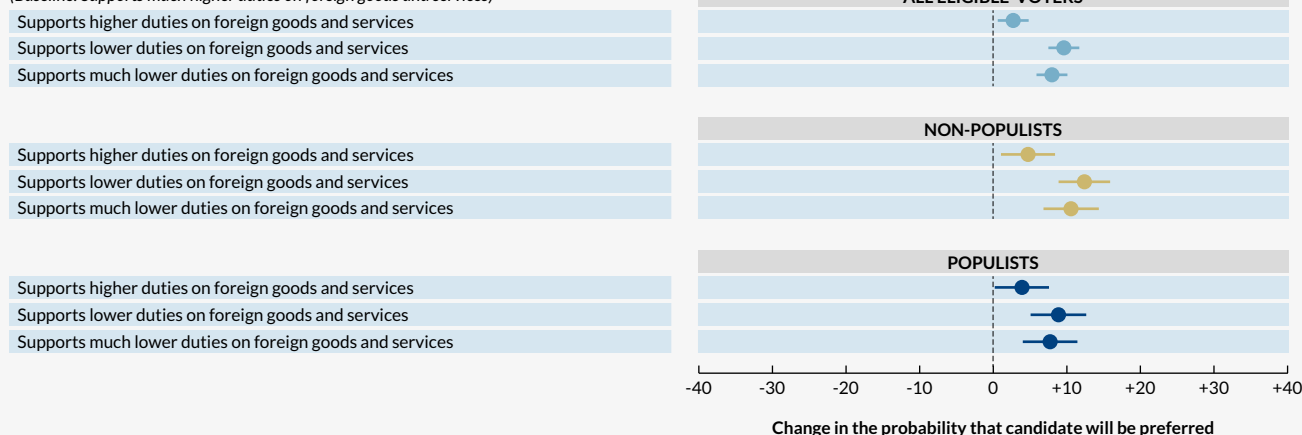
Another new addition to the Populism Barometer is the question of customs policy. Here, again, the results reflect the basic preferences of the Germans for a globalized and open global economy. A further dismantling of customs barriers even has a tangibly greater influence on voters than their general worry about free trade and globalization. A candidate calling for lower customs duties will gain in approval by 9 percentage points, almost double the gains made by a general call for more free trade.

FIGURE 21 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 PROTECTIONISM

(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; probability changes refer to comparison with the baseline category. Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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These figures reflect the greater public attention paid to customs policy: due to increased duties and the trade disagreements between the USA, Europe and China, German voters have also become more aware of this topic. Worries about the future of global trade can thus be observed in the concrete question of customs barriers, which is currently stirring up debate in the USA as a favorite populist topic of the current president.

In Germany, however, even on the question of trade policy there is no difference between populist and non-populist voters. As with free trade, the EU and the euro, the introduction of duties and trade barriers would not be a winning move in either of the camps. The populists would not be mobilized by increased duties à la Trump, and non-populists even less so. On the contrary: currently, it seems that candidates would tangibly reduce their chances of election with such campaigns, and would lose approval across all voters.

Direct democracy: we are the people!

The call for more democracy was analyzed already in the previous year, but only as an additional individual topic and not as a policy area in itself with a range of different standpoints. But since the basic call for more direct democracy belonged to the few additional topics in 2017 with a statistically significant change in election chances could be achieved, in the new edition of the Populism Barometer we wanted more precise information as to the concrete chances for approval and mobilization on this topic.

Across the electorate, there is first of all a clear pattern of approval for the call for more direct democracy. Candidates who either ask for “more” or “many more” referendums can make marked improvements to their approval rates in comparison with candidates who are against such referendums. Correspondingly, those who are against referendums damage their chances of election.

The concrete figures for this are clear and the strength of the effect is comparable with that of social policy topics such as tax and social housing. Those who are for “fewer” referendums reduce their approval rates by 12 percentage points, and those who are for “far fewer” referendums even reduce them by around 14 percentage points. To the same extent, candidates who decisively ask for more referendums can raise their chances of election in comparison with opponents of direct democracy.

FIGURE 22 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

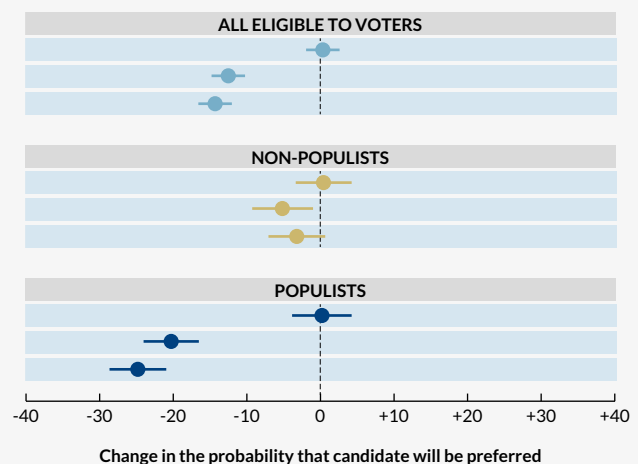
Supports fewer referendums

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; probability changes refer to comparison with the baseline category. Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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Here it is particularly interesting and revealing to look more closely at populist and non-populist respondents. A large part of the general approval for direct democracy comes from populist voters. By differentiating between voter segments, we can see that the topic is much less important to non-populist voters, and their slight preference for more referendums is statistically insignificant.

Quite the opposite is true of the populist voters: here, the preference for more referendums is very clear and is more strongly visible than it is for non-populist voters or for the electorate on average. Candidates who ask for “far fewer” referendums lose out among populist voters by around 25 percentage points. Those who only support “fewer” referendums lose around 20 percentage points. Conversely, candidates who wanted “more referendums” would gain around 20 percentage points compared with those who were against this.

When interpreting this data, it is important to take account of the fact that the call for direct democracy belongs to the constitutive defining characteristics of populism (see figure 1, “What is populism?”). In the context of generally populist attitudes, however, as we have shown, the demand for more direct democracy should be evaluated differently from how it would be in the context of non-populist attitudes and beliefs. The figures from the Populism Barometer now allow us to see that support for direct democracy in Germany has been shaped not insignificantly by support from populist voters.

Populists ask for direct democracy not in the sense of an innovative participative element of liberal democracy, which would supplement the representative processes which belong to the pluralistic formation of opinion. Instead, populists demand direct democracy above all due to deep resentments against liberal and representative democracy and its institutions. In this, they start from the fiction of a unified will of the people, which they want to enforce with the help of direct democracy against the corrupt elites of the ruling parties. With these connotations, direct democracy becomes an illiberal instrument against representative democracy and not, as would correspond much better to the essence of direct democracy, a supplementary element which would improve and strengthen the functioning, the deliberative quality and the responsiveness of representative democracy.

In any case, in discussing the introduction of more directly democratic tools, we should consider the fact that direct democracy also remains susceptible to illiberal intentions and abuse. This should not be understood as a plea against referendums. But it is worth taking great care in thinking through the reasoning behind a supplementary introduction of directly democratic instruments, as well as the concrete processes and safeguards which would be required, so that such instruments could be integrated into the existing processes and institutions of liberal representative democracy.

Radical populism: no thanks!

Finally, we would like to deal more explicitly with the debate over “moderate” versus “radical” populism. Here, the Populism Barometer highlights an interesting dimension which is worth considering: the question of removing power from the ruling political elites in Germany.

Every form and variant of populism contains this inherent element. It is a defining theoretical component and a key practical-political demand of all populism. Furthermore, it is an indicator of the level of populist radicalization. Whilst a moderate populist criticizes the ruling elites and opposes them politically, a radical populist asks that they be stripped of all power immediately. What do the survey results of the 2018 Populism Barometer tell us when it comes to this question?

First of all, across the whole electorate on average, it is clear that the Germans do not wish their political elites to be ejected from power. Despite all the criticism which is expressed in the surveys towards politicians, parties, parliaments and other social elites: no serious movement for the overthrow of top political actors would currently gain any degree of support in Germany. On the contrary: such a

demand would lower approval rates and electoral chances across the electorate by around 12 percentage points. That is the strongest absolute influence of any of the additional individual statements whose effect was measured across the electorate.

The result for the different segments of voters is more interesting: the great difference which we might expect between populists and non-populists is in fact quite marginal on this question. Even among populists, the demand for a downfall of the elites does not increase a candidate's electoral chances, but reduces them, in fact, to an almost comparable extent as it does across all voters, including non-populists. Thus, not even the populists in Germany want to unseat the political elites. That points to a populism which is moderate rather than radical. In this respect, the populists are not going to stir up a revolutionary coup.

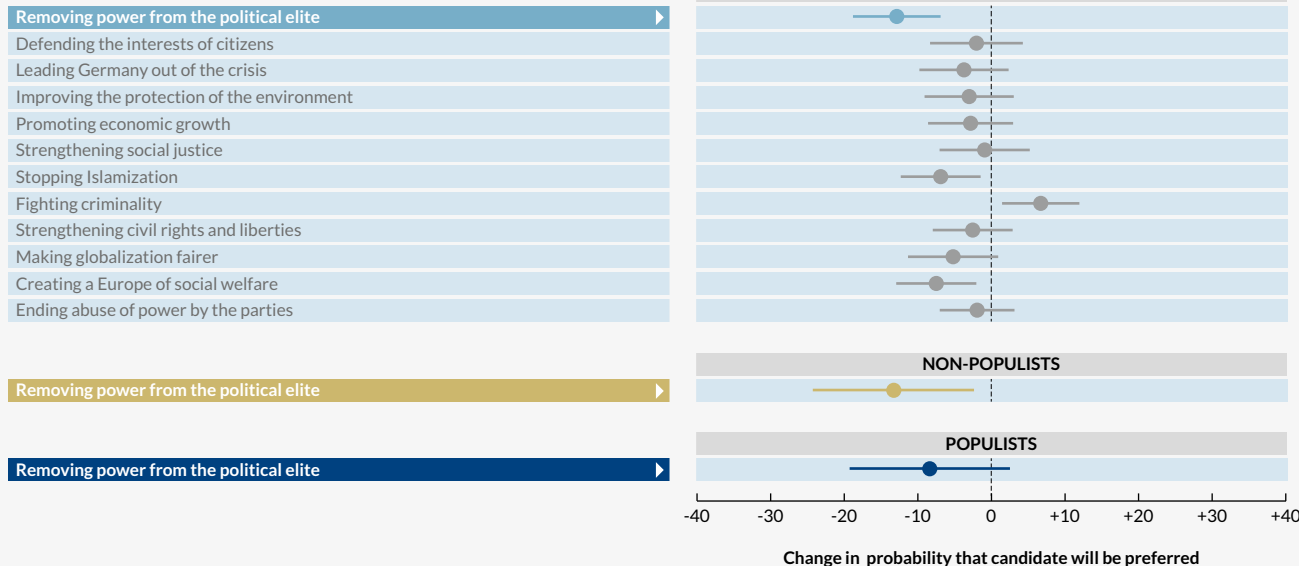
Is this a reason to sound the all-clear? Even moderate populism can become an insidious poison for liberal democracy, if it does not meet with the appropriate reaction. Democracies "die" (Levitsky and Ziblatt 2018) or "end" (Runciman 2018) more slowly today than through putsch or revolution. Even in its moderate variety, populism is therefore a challenge to liberal democracy in Germany.

FIGURE 23 The influence of prioritizing "removing power from the political elite" on the probability of candidate selection across the electorate and among non-populist and populist voters

In percentage points

POLITICAL EMPHASIS 1

(Baseline: fighting corruption in politics)



Method: "Average marginal component effects" (Hainmueller et al. 2014) with confidence intervals (95%) based on standard errors clustered by respondent; probability changes refer to comparison with the baseline category.
Target population: German citizens eligible to vote in 2018.

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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3. Populism at the ballot box

Party preferences and voting intentions of the populist and non-populist electorate in 2018

Populist and non-populist voters have very different party preferences and identifications. And in 2018, populist attitudes continue to influence the preferences and voting intentions of the Germans. In comparison with the electoral year 2017, the current findings of the Populism Barometer show several interesting changes on this front.

The Greens (Bündnis 90/Die Grünen) are the party with by far the fewest populist voters. While the CDU/CSU and the FDP are now significantly more populist than they were at election time 2017, the Greens on average across their voters have even become slightly more non-populist. At the same time, they have shifted ideologically towards the center. The Greens are therefore the non-populist market leaders in the left-liberal center. The SPD, in its populism profile, is rather flat and un-contoured. In trying to bridge the gap between its similarly large segments of non-populists and populists, it is increasingly wearing itself down. A similarly flat profile can also be observed for the voters of the FDP, whose level of populism is about average. The AfD remains an extreme outlier: no other party has

such an extremely contoured profile of populism and no other party is positioned ideologically so far right according to the self-placement of its voters. The AfD therefore remains, a year after the federal elections, an extremely rightwing populist party. On the far-right margin of the populists, the electoral results of the AfD stand at 70 percent: seven out of ten extreme right populists vote AfD. While these ideologically rightwing voters choose the AfD because it is a party far to the right of the center, among the voters of the political center the AfD reaches above all those who are especially populist.

Still, the rejection of the AfD by the great majority of the electorate remains at least as intense as the approval it receives from its supporters. This is demonstrated by the negative voting intentions which the 2018 Populism Barometer collected for the first time this year. These show that 71 percent of the electorate in Germany would “definitely not” vote AfD. More than seven out of ten voters therefore reject the AfD outright. The AfD is thus rejected to a similarly high degree as the rightwing extremist NPD.

IN FOCUS

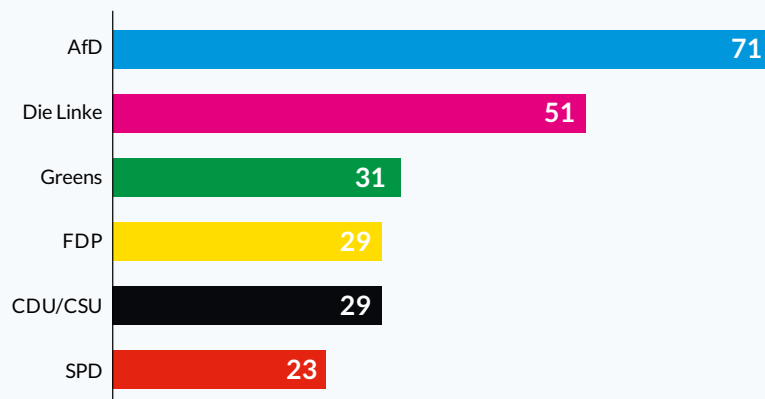
No alternative for Germany

“And tomorrow the whole country?” – asked a recent headline on the topic of why the AfD is so successful. The answer to this from the respondents of the 2018 Populism Barometer was a resounding “no”: Not the whole country, and not even half of it, and most probably not even a quarter, but much less. The positive voter potential of the AfD currently stands at around 14 percent of the electorate (Vehrkamp 2018), which is a sufficient explanation of its current results in polls and surveys. Its negative voter potential stands, with over 70 percent of the whole electorate, at more than five times as much. This is shown by the data collected for the first time in the 2018 Populism Barometer.

When it comes to estimating the scope and voter potential of the parties in the future, we asked for the first time about what are known as negative voting intentions – not just about which party a respondent would vote for, but explicitly also which party the respondent would be “unlikely” to vote for or would “definitely not” choose. The greater the rejection of a party, the more difficult it is for that party to increase its voter potential. The most difficult voters to reach (and it may be impossible to reach them) are those with an explicitly negative voting intention – that is, voters who would “definitely not” choose that party. For the AfD, this is the case for 71 percent of all eligible voters – which means: more than seven in ten voters have a markedly negative voting intention when it comes to the AfD, and would “definitely not” vote for the party.

No alternative for Germany

Negative voting intention (“would definitely not vote for the party”) as a percentage of the electorate



Target population: German citizens eligible to vote in 2018 (sample size: 3,323).

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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For the other parties, negative party identities and voter intentions are at a much lower level: for the CDU/CSU (29 percent), the FDP (29 percent) and the Greens (31 percent), they are less than half as large as they are for the AfD. Compared with the SPD (23 percent), the rejection of the AfD is even more than three times as strong. Only the Left party, with 51 percent, is somewhat closer to the AfD, but is likewise still far below its rejection level. No other party is rejected as strongly by voters as the AfD. The AfD, with this massive rejection from voters, is roughly on the level of the rightwing extremist NPD, although it does have a much higher level of support from voters in comparison with the NPD.

“In terms of rejection from voters, the AfD is roughly on the level of the rightwing extremist NPD.”

Nevertheless, the widespread rejection of the AfD points to the fact that it is regarded as unelectable by the vast majority of all Germans. Its positive potential to gain votes thus seems to have been more or less exhausted. This means that it will be much more difficult for it to broaden its narrowly limited potential to any serious extent in the near future. It would have to reinvent itself in order to achieve that, and would above all have to separate itself from its far-right members and supporters. Doing so would endanger its solid potential for support in those segments. To a large extent, the voters of the rightwing extremist NPD have migrated to the AfD in previous years. The more the AfD tries to make itself electable in terms of its program and its leadership, the more it will endanger its right wing.

Thus, the AfD is faced with something like a “glass ceiling” when it comes to mobilizing voters – and this ceiling is much lower and thicker than it is for the other parties represented in the Bundestag. We therefore have to conclude: no, not the whole country. Not with more than seven in ten voters categorically ruling out voting for the AfD.

How populist are the voters of the parties?

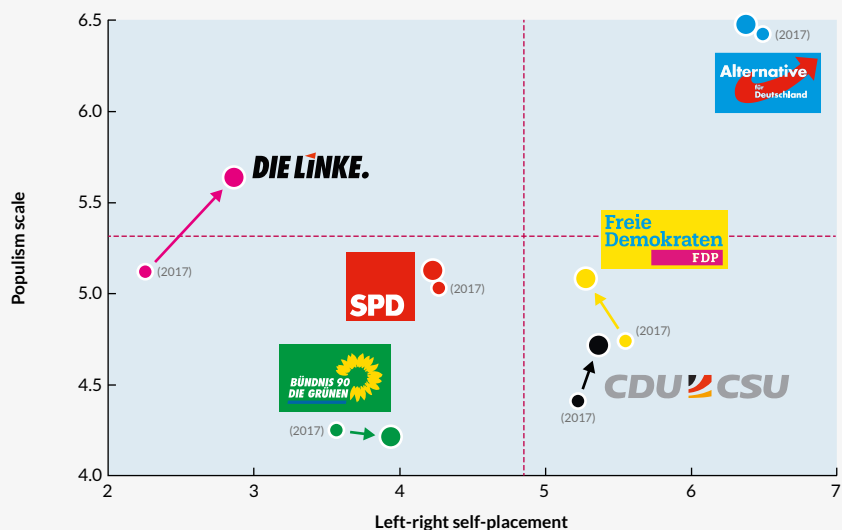
Populists have a different understanding of democracy from non-populist voters (chapter 1). Furthermore, voters with populist views also think differently about many political issues from non-populist voters (chapter 2). But do their populist attitudes also influence their behavior when it comes to voting? Do populists prefer certain parties, and do they vote differently from non-populists?

To answer this question, we start by locating and analyzing voters, according to their voting intentions, as supporters of a particular party. Here, the decisive point is the answer to a weekly election poll (known in Germany as the “Sunday question”: Which party would you vote for if there were federal elections next Sunday?). Beyond party preferences, the Populism Barometer also makes two further measurements: first, the populist leanings of the electorate. For that we use a simple populism scale from 0 (non-populist) to 8 (populist). We also measure ideological left-right orientation through self-placement.

By combining these two dimensions, it is possible to categorize voters of individual parties according to their populist tendencies and their left-right orientation. It is also possible to draw the following picture of the party-political landscape in Germany (figure 24), which emerges by tracing the average populist attitudes of the voters of a party and their average left-right orientation:

FIGURE 24 Party voters by populism and left-right orientation

Significant changes since 2017 are represented by arrows.



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

Target population: German citizens eligible to vote in 2018 (sample size: 3,427).

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

BertelsmannStiftung

When interpreting the political orientation of the parties, it is necessary to look both at their relative positioning compared with each other, and at the comparison of the individual party positionings with the mean value of populist tendencies and left-right orientation across the average of all voters (dashed lines). The mean values show the average populist tendencies and left-right orientation across the electorate. In the two dimensions displayed here, this produces four different quadrants or segments of the party landscape: a rightwing populist segment (more populist than average and at the same time right of the political center) and a leftwing populist segment (more populist than average and at the same time left of the political center), as well as two non-populist, or rather, below average populist segments of voters, of which one is located to the left of the political center and the other to the right of the political center.

The location and movement of the individual parties and their voters in these four segments, compared with the previous year, shows a complex picture of the current political landscape and its changes since the elections of 2017.

CDU/CSU and FDP: a gradual increase in populist attitudes in the traditional center

If we define an ideological positioning slightly to the right of the mean of all voters as the political location of the “traditional center” (known in German as the “bürgerliche Mitte”), then the CDU/CSU and the FDP in Germany are the typical representatives of that section of people. In terms of the right-left orientation of their voters, the 2018 Populism Barometer places them both at almost the same point, with a value of 5.38 for the CDU/CSU and 5.29 for the FDP. They are therefore both slightly to the right of the average of the ideological center (4.86). Marginal changes compared with the previous year have brought them even closer to each other in their ideological positioning, but these are not statistically significant and should not be interpreted as a “swing to the right” by the CDU/CSU or as a “swing to the left” by the FDP. Both parties have confirmed and strengthened their ideological anchoring in the middle-class center of the German electorate.

Significant changes can be seen when it comes to populist leanings: here, for both parties, a gradual intensification of populist attitudes emerges. Thus, populism among CDU/CSU voters rose in 2018 by 0.27 scale points, from 4.44 in 2017 to 4.71. Among FDP voters, the rise in the same period covered 0.29 scale points, meaning that populism rose from 4.79 to 5.08 points.

This does mean that both parties in this camp remain below the average populism level of the whole electorate (5.31). But that is also due to the fact that the mean value compared with the previous year has risen by 0.22 scale points, and that the electorate has therefore become more populist over all. The populism of the center even rose slightly more than it did across all voters on average. We can therefore speak of an increase in populist attitudes in the center which may be gradual, but which is very much noticeable.

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

The voters of the SPD and the Greens in the left-liberal center are markedly more resistant to the creeping increase in populist attitudes. For both parties, the changes are so minimal that they could also result from coincidences due to imprecisions in the survey results. The SPD now stands at 5.12 (+0.08) on the populism scale, whilst the Greens are well below average at 4.20 (-0.04). The voters of the SPD and the Greens have therefore shown themselves to be very much resistant to the increasing populism of the German electorate.

However, the positionings of the SPD and the Greens also remain stable in their differences: while SPD voters are only slightly less populist than the average, and are therefore around the same level as the CDU/CSU and FDP on the populism scale, the Greens are strikingly less populist. Through the growing populism of those parties, the non-populist orientation of the Greens becomes their new unique selling point: in the 2018 Populism Barometer, they are by far the least populist party. Their resistance to populism is becoming the new brand identity of Green voters. At the same time, they have shifted ideologically towards the political center. With their 2018 positioning at 3.94 – in the previous year, this was 3.58 – the Greens may not have swung to the right, but they have moved significantly towards the political center (4.86).

Does this make the Greens the strongest non-populist party in the political center? The changes in the 2018 Populism Barometer point in this direction. It remains to be seen what will emerge in the coming years from the current tendency of an insidious growth in populism in the CDU/CSU and FDP and the simultaneous takeover of the non-populist center by the Greens. We cannot yet say whether this will become a trend that visibly shapes and changes the party-political landscape.

AfD and Die Linke: populism on the political margins

Party-political populism in Germany shows itself most clearly on the political margins: in the leftwing populist segment of the electorate, Die Linke has its unique selling point, and in the rightwing populist segment, the AfD. However, with very great differences in terms of the level and the shape of their populist orientations.

The AfD remains an extreme outlier in the German party landscape. It occupies a position in the rightwing populist segment of the electorate which in both dimensions – on the axis of populism and in terms of right-left orientation – is by far the furthest away from all other parties and from the center. At 6.49 in terms of populism, and 6.38 in terms of rightwing orientation, the AfD is an extreme right populist party. Nothing has changed about this positioning since the 2017 federal elections.

Die Linke voters, however, have changed significantly both in terms of populist leanings and in terms of their ideological orientation compared with the 2017 elections: in the 2018 Populism Barometer, they are both more populist and at the same time slightly less leftwing. Their populist attitudes in the previous year were

only slightly above average, at 5.15 on the scale, and have risen significantly since then to 5.64 (+0.49), which is clearly above average. This shows that the voters of Die Linke are noticeably more populist than in the previous year, but remain, in 2018, much less populist than the voters of the AfD.

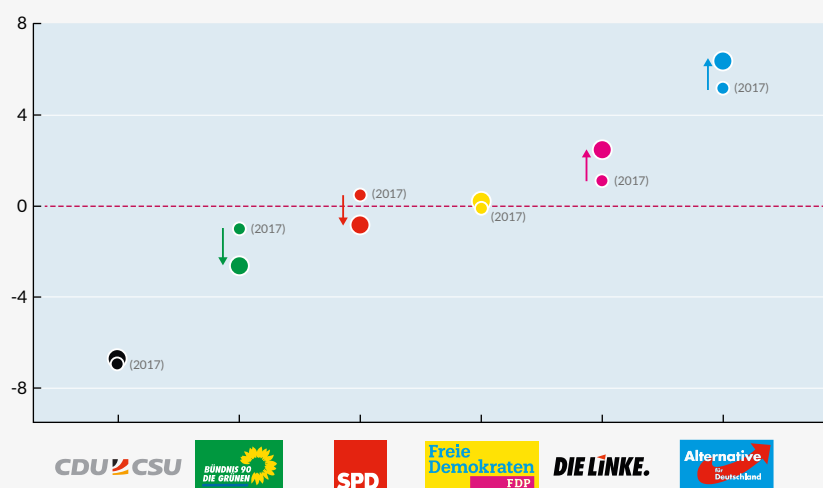
However, this does mean that the growing populism of the mainstream parties has also reached Die Linke. At the same time, Die Linke has shifted ideologically on the scale from 2.27 by 0.59 scale points to 2.86, thus moving significantly towards the center, which means that in the self-placement of its voters, it is slightly less leftwing than it was at the time of the 2017 federal elections. In the overall picture of the German party landscape, Die Linke occupies a very clear place in the leftwing populist segment, for the first time. It may not be a perfect example of a leftwing populist party, but it does at least gradually seem to be moving in that direction.

Which parties benefit from the increasing populism of voters?

The only parties which stand to gain from a more populist electorate are the AfD and Die Linke. For the other parties, more populism is either generally neutral (SPD and FDP) or even markedly negative (CDU/CSU and the Greens). This “populism advantage” can be measured by the change in likelihood of a party being elected, in relation to the level of populism of the voters. Figure 25 shows for each party how strongly their voting results change each time their voters add another point on the populist scale, thus becoming more populist:

FIGURE 25 Change in voting probability

In percentage points (per point on the populism scale)



Changes since 2017 are represented by arrows.

Method: 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 citizens eligible to vote in 2018 with intentions to vote for a specific party (excluding non-voters and those intending to cast invalid votes).

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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In the case of the AfD, this shows that their chances of gaining votes rise by more than 6 percentage points if voters become more populist by one scale point. In the election year 2017, the AfD was the only party whose likelihood of being elected rose with the populist leanings of the voters.

In 2018, that is also the case for Die Linke, for the first time: their likelihood of winning support rose with the increasing populism of voters by 2.4 percentage points. In the election year 2017, this value stood at just above zero, whereas now it has risen to just under half of the strength of the same effect in the case of the AfD. That, too, is proof of the increasing populism of Die Linke, at least in the eyes of its supporters and voters.

The CDU/CSU, however, remains the party whose likelihood of gaining votes decreases most strongly with the growing populist tendency of its voters (-7 percentage points). This means that the negative effect of a further growing populism on the election chances of CDU/CSU is even stronger than it is for the Greens (-3 percentage points).

For the CDU/CSU, that means in simple terms: they would, with great probability, not only make no gains from an increasingly populist electorate. In fact, of all the parties, they would suffer the most in that case. This shows how dangerous any strategy relying on more populism would be for a party which is still, in its brand identity, a mainstream non-populist party. It would risk giving up its place in the non-populist center (Vehrkamp 2018), and would therefore have more to lose than it could win, or win back, on the rightwing populist margins.

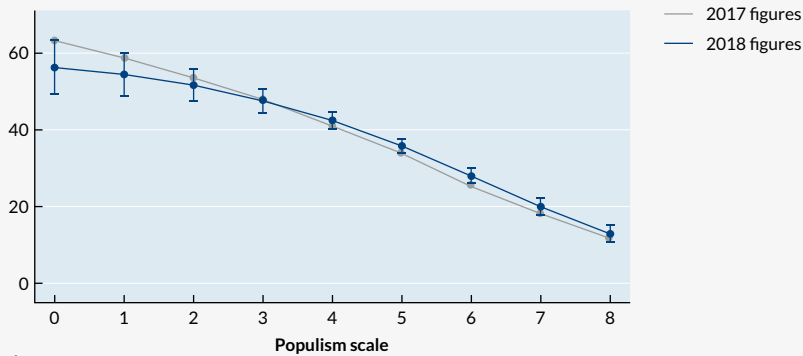
CDU/CSU: surrendering the non-populist center?

This danger of giving up its brand essence in the non-populist traditional center is confirmed by when we analyze the position of the CDU/CSU in more detail. In the segment of entirely non-populist voters, it achieves, with almost 60 percent, by far its best results. In the non-populist third of all eligible voters, the 2018 Populism Barometer shows that it continues to stand at more than 40 percent across the board. But its position is beginning to crumble. Thus, in comparison with the previous year, it has lost support in the segments of the non-populists where it has had the most voters in the past – not in a landslide, but still noticeably. Here, too, the creeping growth of populism in the CDU/CSU emerges, which does not benefit the party overall, because it loses voters in the non-populist segment without winning over new ones in the populist segments.

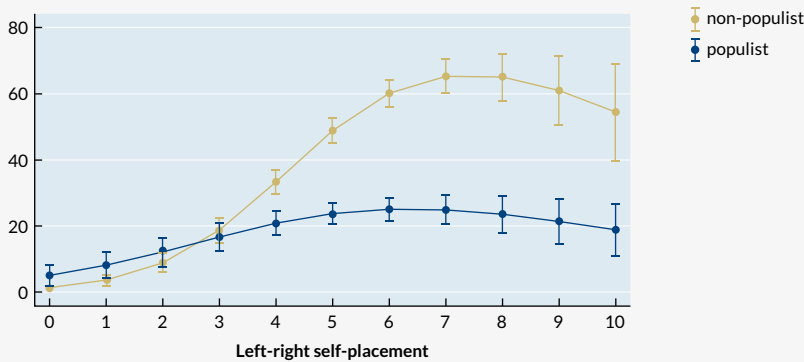
For the CDU/CSU, that means: with more populism, it would give up its role as the strongest political force in the non-populist traditional center, and would lose its brand essence to the Greens – but without winning back the rightwing populist margin which has gone to the AfD. Already now, the CDU/CSU is squeezed between the increasingly non-populist Greens, who are shifting from the left-liberal center to the traditional center, and the rightwing populist AfD from the right. Passively accepting the increasing populism in its own ranks, or even actively trying to build it up, would therefore be an extremely risky strategy for the CDU/CSU, with very uncertain results.

FIGURE 26 Populism and voting intentions for CDU/CSU voters

As a percentage



As a percentage



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

Target population: German citizens eligible to vote in 2018 (sample size: 2,747).

Source: Infratest dimap on behalf of the Bertelsmann Stiftung.

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SPD: holding steady at an average level of populism

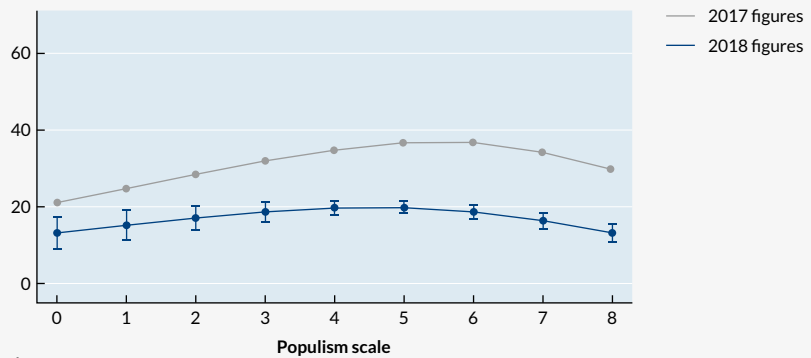
The voters of the SPD may not emerge as a bastion against rampant populism, but they are still standing firm. Their populism remains only at an average level. Thus, in terms of populism, the profile of the SPD is rather flat: their voting results are not particularly distinguished by populism. The party receives roughly the same amount of support from non-populist and populist voters. At any rate, its voter profile has a much clearer shape across the left-right axis than the populism axis.

The generally decreasing support levels of the SPD also show no clear profile: the social democrats are losing about the same number of voters in all segments of the populism scale. Figure 27 (see next page) shows this, as the lines curve downward in parallel. The same connection can also be seen in the lower part of figure 27, where voter intentions of both non-populist and populist voters clearly move in the same direction along the left-right axis.

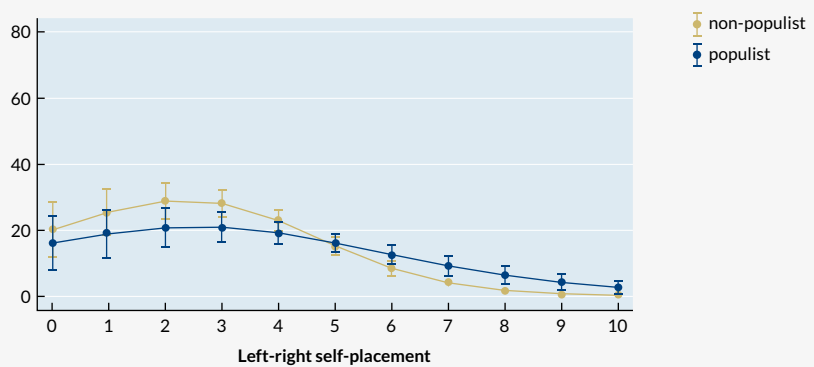
Right of the center, the SPD is not preferred either by populist or by non-populist voters. Left of the center, it only has a slight advantage among non-populist

FIGURE 27 Populism and voting intentions for SPD voters

As a percentage



As a percentage



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

Target population: German citizens eligible to vote in 2018 (sample size: 2,747).

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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voters. Only the FDP has a similarly flat profile when it comes to populism. Both parties therefore face a similar challenge: they have to focus their energies equally on the more populist and the more non-populist groups of voters.

AfD: extreme populism and the rightwing margin

This looks quite different for the AfD: no other party has such an extremely contoured profile of populism, and no other party stands ideologically so far right in the self-placement of its voters. Thus, a year after the federal elections, the AfD remains a strong rightwing populist party. Its voters position themselves clearly in the rightwing populist segment of the German electorate, and within this segment in the far right and at the same time extremely populist corner. In the extremely populist segment of German voters, the AfD has more than 30 percent support on average, and in the extreme rightwing populist segment, even around 60 percent. At the far-right margin of populists in Germany, the AfD can count on 70 percent support, which means that seven out of ten extreme rightwing populists vote AfD.

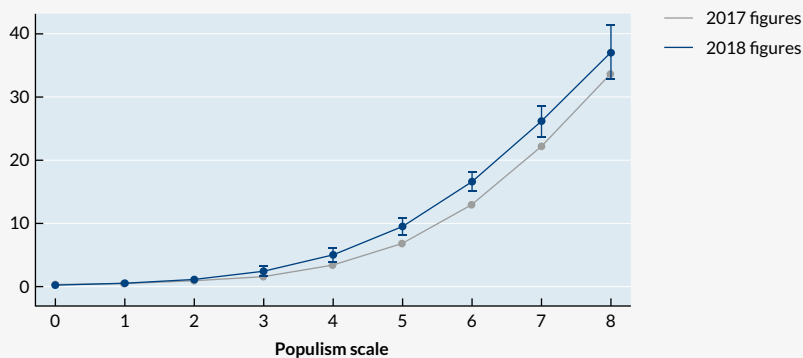
Among non-populist voters, the AfD receives much less support. Left of the center, practically no non-populist voter opts for the AfD. Only right of the center does the AfD also succeed in winning non-populist voters. But in the far-right spectrum, the party's ideologically extreme rightwing orientation dominates even among non-populist voters, so that even among the non-populists on the extreme right, the AfD finishes up with around 30 percent support on average.

A different picture emerges for the populists: here, the AfD is even able to win voters slightly left of the center – and even more so slightly right of the center – who see themselves ideologically as centrist voters. Among populists, the AfD easily reaches more than 20 percent slightly right of the average of all voters, and in the rightwing center, it even reaches more than 40 percent of all voters.

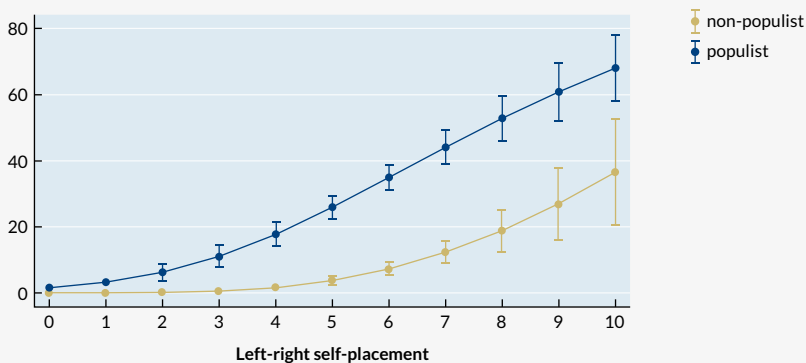
This shows: extreme right voters choose the AfD as the ideologically most rightwing party in Germany. Voters from the political center and slightly right of the center choose the AfD as the most populist party in Germany. In a nutshell: extreme right voters support the AfD because it is rightwing, and center-right voters support the AfD because it is populist.

FIGURE 28 Populism and voting intentions for AfD voters

As a percentage



As a percentage



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

Target population: German citizens eligible to vote in 2018 (sample size: 2,747).

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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That also explains why the AfD is increasingly succeeding in pushing forward into the political center or at least into the center-right: its key to these segments of voters is its extreme populism. That is the mobilization strategy of the AfD in the political center. The rightwing AfD therefore makes use of populism as a kind of Trojan horse (see also p. 22): the AfD voters in the center vote for populism, but in doing so, they get a party which is much further right than would correspond to their own ideological stance. That succeeds because the AfD loads up the “thin ideology” of populism with rightwing ideological content.

But what does this mean for the political fight for the voters in the political center? Which counter-strategies emerge that the mainstream parties could successfully employ?

One thing is clear: no party is such a favorite among extreme populists as the AfD. It is the populist original in an otherwise comparatively non-populist German party-political landscape. In such a constellation, more populism mainly benefits the AfD. The more populist the other parties become, the more strongly they will confirm the populist original and thus open up new swathes of voters to the AfD. At the same time, they will be surrendering their own voters from the non-populist center. The only strategy which promises success for the mainstream parties is therefore a deliberate fight against populism, not an emulation of it. To see how that is done, and how much success it can have among voters, we only have to look at the Greens.

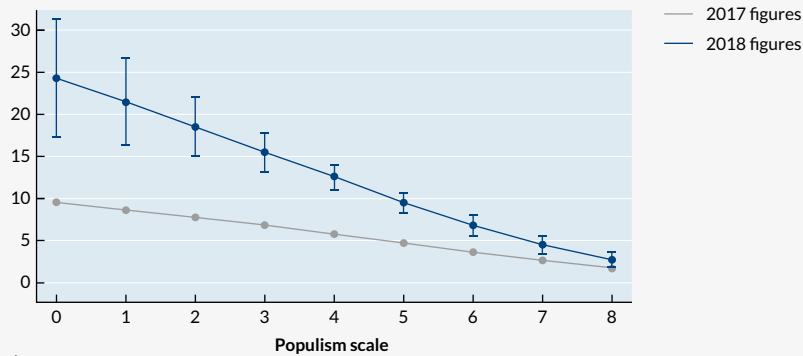
The Greens: non-populist left-liberalism as the new brand identity

The Greens are emerging as the leading non-populist force in the German party-political landscape, slightly to the left of the center. Already in the federal elections of 2017, their electorate had quite a non-populist profile. Since then, this has increased markedly: their anti-populism has become the new unique selling point and brand essence of the Greens. For it is primarily due to increased approval from non-populist voters that the Greens have succeeded in gathering much more support overall. In the non-populist segment, they now reach up to 25 percent of all voters. And the difference in approval has also become more clearly contoured: the more non-populist voters are, the more likely they are to vote for the Greens.

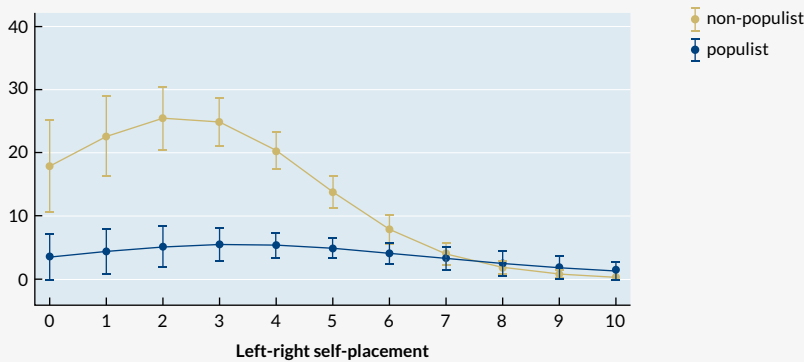
The fact that the growth in support for the Greens is almost entirely due to an influx of non-populist voters is shown first of all by the comparison with the previous year (see the upper part of figure 29): the difference in voter approval is much greater at the non-populist end of the populism scale and in the center than it is in the populist segment. Radical populists practically never vote for the Greens. The greatest voter potential of the Greens lies instead in the non-populist voter segments left of the center. In this context, it is also interesting to see that the profile of non-populist voter support has shifted even further in the direction of the center. Already in the average of left-right orientation of all voters (4.86), the Greens achieve 15 percent, and already slightly left of the average, they even reach 20 percent and more. Like a wave, non-populist voter approval for the Greens is shifting from the left into the center, where the party above all competes with the non-populist parties of the traditional center, which are either unable or unwilling to resist populist temptations.

FIGURE 29 Populism and voting intentions for Green voters

As a percentage



As a percentage



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

Target population: German citizens eligible to vote in 2018 (sample size: 2,747).

Source: Infratest dimap on behalf of the Bertelsmann Stiftung.

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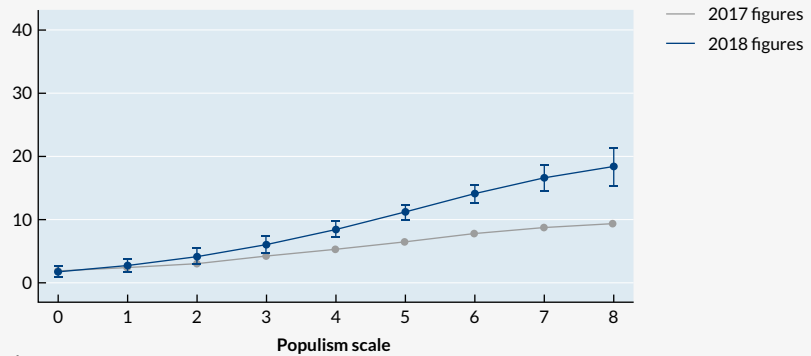
Die Linke: populist temptation on the leftwing margin

The Left party, too, is currently either unwilling or unable to resist this temptation. Its voters have become significantly more populist in comparison with the previous year. That becomes clear in the change in the slope of voting intentions according to populist leanings (see figure 30 on the next page). The 2018 curve in voter intentions according to populist leanings is markedly less flat and climbs at the populist end of the scale much more steeply than in the previous year. The comparison between voter support in the populist and non-populist segments allows us to see that Die Linke has better results among populists across the whole left-right spectrum than it does among non-populist voters (see the lower part of figure 30 on the next page).

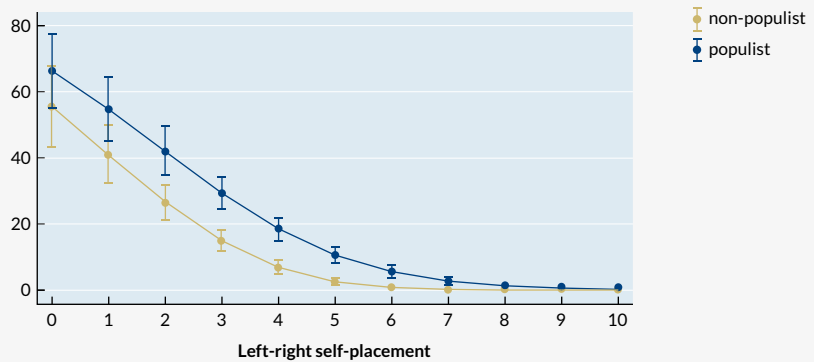
Die Linke tends to react in the same way as the CDU/CSU and FDP to the populist challenge of the AfD: it seeks and evidently finds further support especially in the populist segment. In contrast with the CDU/CSU and the FDP, it seems rather to have benefited from this so far. Its level of support has, at any rate, improved compared with the previous year. Whether more populism will continue be worth

FIGURE 30 Populism and voting intentions for Die Linke voters

As a percentage



As a percentage



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

Target population: German citizens eligible to vote in 2018 (sample size: 2,747).

Source: infratest dimap on behalf of the Bertelsmann Stiftung.

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it for die Linke in the future is uncertain, to say the least. This party, too, is taking a risk, endangering the support of its ideologically leftwing non-populists, who in comparison with populist voters may be less numerous in the electorate of Die Linke, but who remain a large and vital group which is rather over-represented among the members and officials of the party.

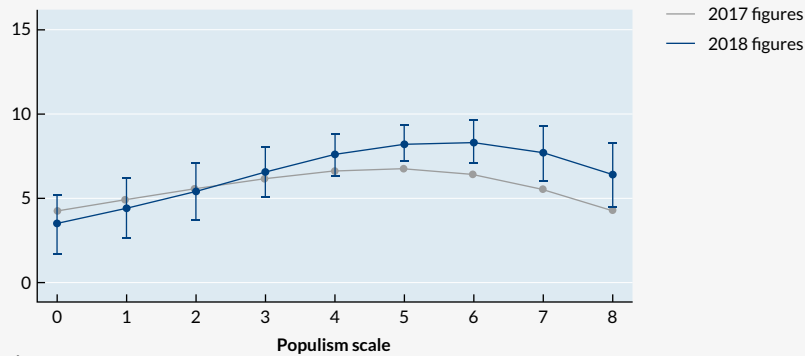
FDP: the increasing populism of the traditional center

Also among the voters of the FDP, a somewhat stronger leaning towards populism can be observed in 2018 than in the election year. Whilst in 2017, the party still achieved the most support in the voter segment with an average level of populism, now it is strongest among voters who are more populist than the average. Still, these changes are fairly marginal overall (see upper part of figure 31).

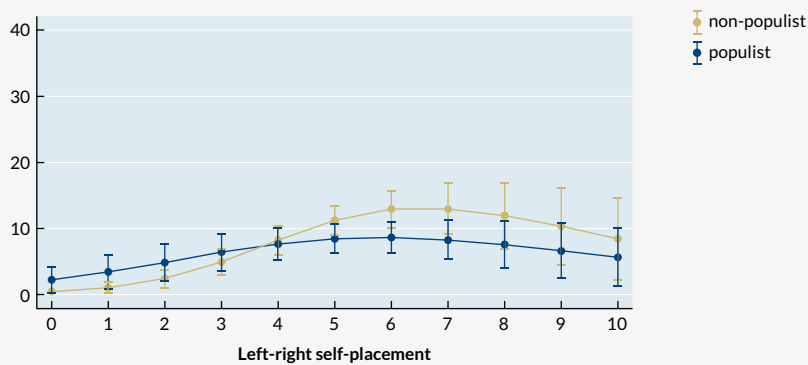
Somewhat more substantial changes can be observed when it comes to the voting intentions of populists and non-populists along the ideologically left-right axis. Here, it becomes clear that the FDP has slightly lost support among the non-populist voters right of the center, and has slightly gained support among the populist

FIGURE 31 Populism and voting intentions for FDP voters

As a percentage



As a percentage



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

Target population: German citizens eligible to vote in 2018 (sample size: 2,747).

Source: Infratest dimap on behalf of the Bertelsmann Stiftung.

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voters right of the center. That explains its gradually increasing tendency towards populism, which was mentioned above.

In terms of the overall picture, however, it is also the case for the FDP that its voters have a comparatively flat populism profile, which means that both populist and explicitly non-populist voters opt for the FDP. Thus, for the FDP, too, more populism remains risky, and would endanger its non-populist core slightly to the right of the center.

Drawing conclusions: do we need a new “anti-populism”?

The attempts of the mainstream parties so far to stem the AfD’s flow of right-wing populism have failed for the time being. This is also shown by the findings of the 2018 Populism Barometer: populist attitudes remain widespread, and are even increasing in extent and intensity, especially in the political center. The AfD derives the main benefits from this.

But what does that mean when it comes to dealing with the AfD and the growth of rightwing populism in Germany? Do the mainstream parties also need “more populism”? Or do they instead need an “anti-populist” change in strategy? And if so, how might that look?

First of all: growing populism in Germany is always a symptom. Populism is never successful without a reason. It has causes. Even in Germany!

However, one thing is equally clear: we cannot fight fire with fire. At the very least, fighting populism with more populism runs the risk of increasing the problem rather than solving it.

Any “anti-populism” therefore has to be based on recognizing and combating its actual causes. And those lie deeper than is obvious from the populist symptoms alone. Social divisions, the disintegration and segmentation of society, new cultural and social divides, and the still unfinished process of German reunification, these are just a few of the key words. Others relate to the state of democracy itself: the erosion of the major parties, gaps in representation and deficits in responsiveness, and an increasingly self-referential cosmopolitan elitist discourse which more or less rejects communitarian values and problem-solving strategies. Populists evidently have no answers or solutions of their own to these problems. But they benefit as long as that is also the case for the mainstream parties.

Successful “anti-populism” therefore has to find new solutions which build bridges and overcome divides. For this, it is essential to recognize and reduce existing gaps in responsiveness. More social justice is at the center of that, along with overcoming social and cultural divisions, as is also shown by the findings of the Populism Barometer. But as necessary as such a change in politics may be, it is still not enough on its own. “Anti-populism” also has to be “popular” in itself, it has to speak to people, it has to reach them in their language, it has to meet them in their everyday lives and respect them, and it has to decrease the distance which has emerged between mainstream politics and citizens. For that, “anti-populism” does not have to be populist. But it must be “popular”, otherwise it will not win any of the democratic majorities which it very much needs in order to bring about change.

Methodological appendix

Throughout the study, in all relevant analyses, we use survey weights to adjust the results to the population of German citizens who were eligible to vote as of the 2017 federal election.

Chapter 1

The eight populist items in Figure 1 originate in part from the academic literature (see, for example, Akkerman et al. 2013; Hawkins et al. 2012), and were in part developed independently for this study. Exploratory factor analyses confirm that all items load on a common factor. The existence of a second factor tends not to be confirmed (eigenvalue < 1). Cronbach's alpha for the eight items shows a high degree of internal consistency (alpha = 0.87). Apart from the "in focus" figure "No alternative for Germany" and the list experiments, all results are based on a sample of 3,427 people who were eligible to vote in the 2017 federal election.

For the analysis of the social desirability of populist attitudes, a total of three list experiments were carried out during the first panel survey. These experiments' basic survey design is illustrated in Figure 32 (see figure 32 on the next page). 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.

In the chapter, the survey results used are for the following questions and associated items, which are not described in full in the main 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

FIGURE 32 Example list experiment design

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

GROUP A

I would rather be represented by a citizen than by a specialized politician.

I wish that the phase-out of nuclear energy could be reversed.

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

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

Number of statements which you...



agree with _____



do not agree with _____

GROUP B

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

I wish that the phase-out of nuclear energy could be reversed.

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

Number of statements which you...



agree with _____



do not agree with _____

Source: Own illustration.

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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 1,713 respondents and 17,127 candidate profiles (issues: EU, taxes, refugees, free trade and globalization), or 1,714 respondents and 17,140 candidate profiles (issues: euro, social housing, protectionism, direct democracy). The findings are based on the “average marginal component effects” regression estimator (see, for example, 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 allowed to be identical. The findings presented are corrected for the resulting differences in the probability of individual vignette profiles. The basic design of the survey for the conjoint experiment is illustrated by figure 33.

FIGURE 33 Example conjoint experiment design

Please read the descriptions of the two candidates carefully.

Afterwards, tell us 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 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 34 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 investment 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 findings in this chapter are based on various logistic and multinomial logistic regression analyses. The populism scale emerges as the sum of a respondent's agreements with the eight populist items, newly scaled per item from 0 ("strongly disagree") to 1 ("strongly agree"). In all models, we control for education, income, gender, age and left-right self-placement. For the calculation of all predicted probabilities in the chapter, covariates were fixed at their observed values ("observed value approach"). This enables these probabilities to be interpreted as an estimate of the share in the target population (see Hanmer and Ozan Kalkan 2013).

Voting intentions: Multinomial logistic regression ($n = 2,747$) with the various parties as outcomes and the populism scale and the populist attitude factor variable as main regressors. People who replied, "I would not vote", "I would spoil my ballot", "I don't know" or "no answer" to the weekly election poll were excluded from the analysis.

Which party would you vote for if the federal election were to be held this Sunday, or would you 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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Authors

Dr. Robert Vehrkamp

Prof. Dr. Wolfgang Merkel

Responsible for content

Dr. Robert Vehrkamp

Christina Tillmann

Support with content

Lars Bischoff

Editing support

Gaëlle Beckmann

Sandra Stratos

Translation

Dr. Lucy Duggan

Cover image

Shutterstock/wellphoto

Graphic design

Markus Diekmann, Bielefeld

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Address | Contact

Bertelsmann Stiftung
Carl-Bertelsmann-Straße 256
33311 Gütersloh
Germany
Phone +49 5241 81-0

Dr. Robert Vehrkamp
"Future of Democracy" Program
Phone +49 5241 81-81526
Fax +49 5241 81-681526
robert.vehrkamp@bertelsmann-stiftung.de

Christina Tillmann
"Future of Democracy" Program
Phone +49 5241 81-81335
Fax +49 5241 81-681335
christina.tillmann@bertelsmann-stiftung.de

www.bertelsmann-stiftung.de