

## Full length article

## Intertemporal evidence on the strategy of populism in the United States

Gloria Gennaro<sup>a,\*</sup>, Giampaolo Lecce<sup>b,c</sup>, Massimo Morelli<sup>d,e,c</sup><sup>a</sup> University College London, Department of Political Science, 29/31 Tavistock Square, London, WC1H 9QU, United Kingdom<sup>b</sup> University of Bergamo, Italy<sup>c</sup> CEPR, United Kingdom<sup>d</sup> Bocconi University, Italy<sup>e</sup> LISER, Luxembourg

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## ABSTRACT

This paper studies the strategic adoption of populist rhetoric in electoral campaigns – i.e., the supply side of populism. We build on existing studies to argue that populist campaigning is more likely to be chosen by politicians who face an electorate characterized by high economic insecurity. We add that two other factors are crucial determinants of the choice of a populist campaign strategy, namely the closeness of the election and the candidate's outsider status. We apply automated text analysis to campaign websites for the 2018 and 2020 congressional elections and construct a continuous index of populism in campaign documents. We provide evidence that indeed outsider candidates in competitive races resort to more populism in response to higher economic insecurity. Drawing connections between theories of voter mobilization and populist discourse, this paper sheds light on how local economic and political conditions are key to understanding the strategic supply of populism.

## 1. Introduction

Several liberal democracies have seen the emergence of populist parties and candidates in recent years. The global scale of this phenomenon has drawn much attention to the study of macroeconomic and cultural factors that provide an answer to the question *why now?* (Frieden and Walter, 2017; Rodrik, 2018; Norris and Inglehart, 2019; Guiso et al., 2019; Guriev and Papaioannou, 2022; Lee, 2020; Noury and Roland, 2020). In this meaningful endeavor, little attention has been devoted to the study of how local factors influence the supply of populism. Amid the global populist wave, what explains the local heterogeneity in the intensity of populist appeals? Is this only due to heterogeneity in the demand for populism, or does strategic supply play a role? Drawing connections between mobilization and populist discourse, this paper shows that the interaction of economic and political conditions is key to understanding the strategic supply of populism.

We propose that candidates need to be strategic in their supply of populism for the purpose of maximizing mobilization among their party supporters, because populist campaigning implies trade-offs. In particular, populist rhetoric may mobilize disillusioned voters in the short run, but typically demobilizes core partisan supporters (Immerzeel and Pickup, 2015) and generates reputation costs and constraints on policymaking in the long term (Bellodi et al., 2024; Funke et al., 2023).

In this trade-off, three elements are likely to affect the candidate's strategic calculations: the mass of disillusioned voters, the candidate's outsider status, and the closeness of the electoral race. The first element determines the extent to which there is local demand for populism: the larger the share of disillusioned voters, the higher the expected electoral gain from mobilization. The second and third elements pertain to the political conditions that make populism a rewarding campaign strategy. Outsider candidates have a natural advantage in resorting to anti-elite rhetoric, as they can more credibly condemn elite's behavior and claim distance (Barr, 2009; Bonikowski and Gidron, 2015), and voters perceive them as more likely to introduce change (Karakas and Mitra, 2020). Yet, when an election is expected to have a clear winning party, an outsider should be unwilling to pay the long-run costs for a much lower short-run benefit. Closeness of the race magnifies the short-term benefits. We predict that outsiders should be willing to push full force on populism when campaigning in places characterized by a significant presence of disillusioned voters and high economic insecurity, and where the electoral competition is expected to lead to a close race.

We test the above predictions on a novel dataset of campaign websites from the 2018 and 2020 congressional elections in the United

\* Corresponding author.

E-mail addresses: [g.gennaro@ucl.ac.uk](mailto:g.gennaro@ucl.ac.uk) (G. Gennaro), [giampaolo.lecce@unibg.it](mailto:giampaolo.lecce@unibg.it) (G. Lecce), [massimo.morelli@unibocconi.it](mailto:massimo.morelli@unibocconi.it) (M. Morelli).<sup>1</sup> It is worth noting that other conceptualizations of populism also obtain this antagonistic rhetoric as an epiphenomenon (Bellodi et al., 2023).

States and measure populism as expressed in those campaign documents. One of the recognized components of populism is a rhetorical style that opposes the virtuous people to the corrupt elite. This rhetorical manifestation of populism is consistent with the ideational conceptualization of populism (Mudde and Kaltwasser, 2018), where populism is described as a “thin ideology” whose main content consists precisely of this juxtaposition<sup>1</sup> This approach has generated extensively validated dictionaries (Pauwels, 2011) and constructs (Wuttke et al., 2020). We draw on those to build a continuous index of populism that varies at the document level. We find that outsiders are more populist than insiders on average, and that there is significantly higher variance in their use of populism. In particular, candidates for the House of Representatives, who were political outsiders, used more populism when running in a district characterized by higher economic insecurity and stiffer electoral competition. Conversely, neither insider nor outsider candidates resorted to populism in response to discontent in non-competitive districts.

Additional analyses add nuances to our core results on the congressional elections. First, heterogeneity analysis reveals that congressional candidates use more populism in states where there is a clear public signal of the local demand for populism. In particular, we take support for populist presidential candidates (within each party) as public signals, and show that Republican candidates engage more in strategic populist rhetoric when running in states where the local support for Donald Trump is higher; at the same time, we find the same effect for Democrats running in states where the local support for Bernie Sanders is higher. Second, we use the CCES survey data (Schaffner et al., 2019) collected around the 2018 campaign and match respondents to their local party candidate. We show that candidates’ populist rhetoric mobilizes weak or disillusioned voters and depresses turnout of core partisans, in line with the idea that when an election is not a close race, candidates should stay away from populist rhetoric in order to avoid losing the core of the party.

This paper contributes to several strands of research. First, it adds to a growing literature on the supply side of populism. In Acemoglu et al. (2013), candidates use populism to signal distance from corrupt elites. Bellodi et al. (2023) show that the choice of using populist rhetoric is selectively employed by rational political candidates whose campaign platform consists of easily monitorable policy promises. In their setting, populist rhetoric is particularly effective in mobilizing a distrustful electorate against non-populist opponents.<sup>2</sup> As candidates allocate effort across campaign issues (Polborn and Yi, 2004), more effort spent at blaming the elite implies less effort devoted to show expertise or illustrate rich policy platforms, championing instead simplistic reforms.

Second, this study aligns with existing work that interprets populism as a framing choice (Aslanidis, 2016; Moffitt and Tormey, 2014). Populism works in conjunction with host ideologies which provide a programmatic profile in a given time and space (Stanley, 2008; Mudde and Kaltwasser, 2018). This view calls for a minimal definition of populism, that may be used to interpret a vast range of political expressions (Mudde and Kaltwasser, 2013; Rooduijn, 2014). The smallest common denominator seems to be a Manichean narrative centered around the juxtaposition between the corrupt elite and the virtuous people, and a generalized claim that sovereignty should be returned to “the people” (Mudde, 2004). Emphasizing the rhetorical component within the thin-ideology view, many scholars would agree that populism varies in intensity, and the degree of populism (De Vreese et al., 2018) can be interpreted as an attribute of a particular text. A crucial step in the direction of evaluating the intensity of populism was made by building measures of populism in political discourse (e.g., Jagers and Walgrave, 2007; Hawkins, 2009; Deegan-Krause and Haughton, 2009;

Pauwels, 2011; Rooduijn and Pauwels, 2011; Vasilopoulou et al., 2014; Manucci and Weber, 2017; Bernhard and Kriesi, 2019). Building on those works, this paper explores how the intensity of populism varies with an interaction of characteristics of the candidate, the race, and the electorate.

Third, electoral campaigns offer a privileged political space where to exert the art of rhetoric. In this context, political discourse can be used strategically to persuade, mobilize, or manipulate potential voters (Riker, 1986; Dickson and Scheve, 2006; Druckman et al., 2009). Indeed, candidates can use their campaign discourse to emphasize issues (Sides, 2006), claim trait ownership (Hayes, 2005), and target persuadable voters (Hillygus and Shields, 2008); they can use rhetoric to appear more moderate and elucidate issue positions (Kaplan et al., 2006), or to influence voters’ view on their personality traits (Fridkin and Kenney, 2011). One way in which political campaigns can be influential in determining vote choice is by proposing frames through which voters can interpret political phenomena as well as policy positions (Sides, 2006; Chong and Druckman, 2007; Busby et al., 2019). Spanning across cases, this paper highlights the common strategic incentives behind the use of populism in different electoral domains.

## 2. Populism as a strategic choice

This section presents our theoretical framework and discusses how three main factors affect the candidate’s choice to resort to populism: outsider status, local economic insecurity, and the closeness of the electoral race.

*Factor 1: outsider status.* Candidates are not all equally likely to resort to populism. In particular, populism is intuitively more likely to be chosen among outsiders to traditional politics (Bonikowski and Gidron, 2015) and less popular candidates (Dai and Kustov, 2022). If outsiders have long been considered mainly as inexperienced politicians (Jacobson, 1989), a more recent literature suggests that they adopt specific behaviors that set them apart from other candidates and make them increasingly successful in congressional elections (Porter and Treul, 2023). For instance, outsiders strategically select districts where to run (Canon, 1990), their political affiliation or entry choice (Buisseret and Van Weelden, 2020; Eguia and Giovannoni, 2019). Those behaviors are motivated by the fact that voters recognize them as bringing distinct features to the race, including credible claims to anti-elitism (Hansen and Treul, 2021), a key component of populism. Building on this literature, we claim that outsider politicians enjoy a specific advantage when resorting to populism, that is, they can more credibly claim to be different from the elite they are attacking and, at the same time, representative of the people. This advantage only relates to being an outsider, and hence should always materialize, independently of other conditions being true. Our first hypothesis is that:

**H1:** Outsider political candidates use more populist rhetoric than insiders on average.

This hypothesis provides an adaptation of existing theory to our specific context. The important, yet largely unanswered, question is whether outsiders use populist rhetoric *strategically* during an electoral campaign, and if so, under what conditions. The next two paragraphs discuss the strategic incentives that inform this decision.

*Factor 2: economic insecurity.* Prolonged economic insecurity produces crises of representation (Laclau, 2005; Roberts, 2017), where a substantial share of the voters do not identify with traditional parties, distrust the political system, and hold anti-establishment views (Mudde and Kaltwasser, 2012; Gidron and Hall, 2020).

At the individual level, a large literature has documented the empirical link between economic insecurity and diminishing trust toward traditional parties, politicians, and institutions, or depressing party identification (Foster and Frieden, 2017; Guiso et al., 2023; Altomonte et al., 2019; Ananyev and Guriev, 2019; Bellettini et al., 2021). At the aggregate level, macroeconomic shocks have been associated with

<sup>2</sup> Fox and Shotts (2009) provide an accountability theory of the choice between a committed delegate campaign strategy and a trustee strategy.

growing mistrust in the political system (Hernandez and Kriesi, 2016; Frieden and Walter, 2017), and favor the electoral success of populist parties. Bellodi et al. (2023) further show that low trust in the political system also predicts the candidate's choice of a committed delegate representation strategy. Our analysis also confirms this relationship. While we focus on economic insecurity in our main empirical analysis, Appendix Table A14 documents the positive relation between aggregate economic insecurity and distrust in our dataset, and Appendix Table A22 shows that this relation can also be detected at the individual level.

Economic insecurity and the correlated disillusionment generate local demand for populism. Absent this demand for populism, there is little to be gained from a populist strategy, everything else equal. In other words, economic insecurity is a *necessary* condition for a populist campaign to gain some electoral rewards. Under those conditions, new political entrepreneurs have an opportunity to harness discontent and mobilize disillusioned voters against the traditional party system (De Vries and Hobolt, 2020).

At the same time, economic insecurity is not a *sufficient* condition for a populist strategy to be attractive. The closeness of the electoral race (as explained more extensively below) determines the strategic calculus in the cost-benefit analysis that the politician undergoes when choosing whether to adopt a populist campaign strategy.

*Factor 3: closeness of election.* Outsiders are in the best place to fill the political space opened by the representation crises, and do so by leveraging populist rhetoric. However, as any model of campaign messaging would predict (e.g., Hillygus and Jackman, 2003; Lau and Rovner, 2009), the effects of populism vary across subsets of voters. In particular, it has been shown that populism mobilizes the politically dissatisfied while depressing participation from the more satisfied (Immerzeel and Pickup, 2015).

Therefore, the strategic incentives to use populism vary depending on two key aspects: the relative share of dissatisfied voters and the potential long-run costs involved in alienating core party supporters. As discussed above, economic insecurity will affect the relative size of those two groups. The larger the share of disillusioned voters, the larger the mobilization gain (and the smaller the demobilization loss) that can be expected from a populism campaign. Yet, the demobilization of core party supporters is likely to produce a cost that persists over time. Growing empirical evidence suggests that adopting a populist strategy is costly in expectation. For example, populist candidates often commit to policy recipes that prove ineffective, or even harmful in the future (Bellodi et al., 2024; Funke et al., 2023; Dornbusch and Edwards, 1990). As time goes by, the newly mobilized supporters are then unlikely to provide compensation for the demobilized core voters. Hence, candidates face this fundamental trade-off: on the one hand, in a district with high economic insecurity and many disillusioned voters, the use of populist campaigning could lead to a sharp increase in their turnout, but on the other hand, the demobilization of core partisans could have long-run costs.

The only case where the short-run benefits can possibly outweigh the long-run costs is in close races, where mobilizing disillusioned voters can be sufficient to bring victory at the margin. If elections are not close, on the other hand, the small benefit brought about by a larger (but still losing or winning) vote share does not compensate for the anticipated costs of a populist campaign.

**H2:** In non-competitive races, the intensity of outsiders' populist campaigning does not depend on local economic insecurity.

**H3:** In competitive races, the intensity of outsiders' populist campaigning is positively related to local economic insecurity.

In empirical terms, these last two hypotheses provide predictions on the marginal effect of economic insecurity on outsiders' use of populism, across competitive and non-competitive races. If we find support for these predictions, this should be taken as strong evidence that populism is mostly a political strategy, which politicians tune up or down depending on the contexts.

*Additional considerations.* Our theory leaves some questions unaddressed. In particular, we do not predict the direct effect of economic insecurity on populism. According to our theory, the effect of economic insecurity depends on the candidate's outsider status and race competitiveness. Which effect will prevail in the data depends on the distribution of those factors. For the same reason, we do not predict the direct effect of race competitiveness on populism. Moreover, one may wonder how insider candidates should respond to those incentives or to the opponent campaign strategy when the latter is an outsider. Insider candidates are affected by systematic disadvantage in the use of populist rhetoric, and hence will adopt different rhetorical strategies that may or may not correlate with populism. Moreover, their incentives are likely to vary depending on their seniority, i.e., their distance from the status of outsider. All those considerations suggest that the study of insider candidates requires a specific theory that goes beyond the scope of this paper.

### 3. Empirical strategy

#### 3.1. Measuring populism in political discourse

We test our theory on the 2018 and 2020 congressional elections. For congressional elections, each document is the program page on a candidate's official campaign website, which corresponds to their main campaign message (see Druckman et al., 2009, 2018, for a validation of websites as sources of campaign rhetoric). We manually collect demographic characteristics (gender, age, ethnicity, level of education) and political variables (party affiliation, previous political experience, incumbency status) both from their websites and alternative sources.<sup>3</sup> For 2018, we collected 805 electoral platforms from candidates for the House, out of a total of approximately 1020. For 2020, we collected 851 platforms out of 1208 candidates. Most of the missing data come from independent candidates, with no website. In what follows, we restrict the analysis to Democrats and Republicans only.

We measure populism at the level of the campaign message using an automated dictionary-based method. Our starting point is the dictionary of populist words developed by Pauwels (2011) and further extensively validated by Rooduijn and Pauwels (2011). The authors adopt the minimal definition of populism (Mudde and Kaltwasser, 2013) and propose a dictionary that captures the essential dimensions of the concept: the people as a homogeneous and pure entity (e.g., "people"), the elite as a homogeneous and corrupt entity (e.g., "establishment", "corruption"), the people and the elite as two antagonistic groups (e.g., "arrogant", "betray"), and the need to give power back to the people (e.g., "direct", "referendum"). Their final measure of populism is the relative frequency of populist words in each text.

We modify their methodology in two important ways. First, we substitute simple word frequencies with "Term-Frequency Inverse-Document-Frequency" (hereafter tf-idf) (see for instance Ramos et al., 2003). This procedure adds a penalty to words that appear in more documents and are less likely to contain distinctive information. For instance, if "people" appears in more documents than "corrupt", then it will be assigned a lower weight. Second, we adopt an aggregation rule over tf-idfs that incorporates recent developments of the concept of populism. In particular, Wuttke et al. (2020) and Meijers and Zaslove (2020) highlight how populism is a multi-dimensional concept, whose components do not compensate each other. In other words, high levels of anti-elitism do not qualify as populism in the absence of people-centrism, and vice versa. We bring this important insight to the measurement of populist rhetoric.

The initial dictionary is composed of 27 stemmed words. For each of these words, we include all words in WordNet (Miller, 1998) that

<sup>3</sup> The main alternative sources are *votesmart.org*, *ballotpedia.org*, *wikipedia*, and local newspapers.



share the same initial pattern and take their stems.<sup>4</sup> We manually exclude all words that have no relation with the concept of populism (e.g., “classroom”, “classist”). Our final dictionary is composed of 34 stemmed unigrams. We prepare the documents in our corpus by removing punctuation, capitalization, stopwords, and digits; we then stem all remaining words. For each token in the dictionary, we compute its tf-idf. Using a bag-of-words representation, where a document is a set of words and a corpus is a set of documents, we can write:

$$tf\text{-}idf_{w,s} = \frac{f_{w,s}}{|s|} \times \log \frac{|S|}{|\{s \in S : w \in s\}|}$$

where the tf-idf for word  $w$  in document  $s$  is a function of the absolute frequency of  $w$  in  $s$  ( $f_{w,s}$ ), the number of words contained in document  $s$  ( $|s|$ ), the number of documents contained in corpus  $S$  ( $|S|$ ) and the number of documents in corpus  $S$  that contain word  $w$  ( $|\{s \in S : w \in s\}|$ ).

We split our dictionary into its two main components, i.e. the elite portrayed as corrupt and betraying the people ( $e$ ) and the virtuous people and their direct access to power ( $p$ ). We then apply the following aggregation rule:

$$Pop_s = \begin{cases} \sum_{e \in s} tf\text{-}idf_{e,s} + \sum_{p \in s} tf\text{-}idf_{p,s} & \text{if} \\ \sum_{e \in s} tf\text{-}idf_{e,s} \sum_{p \in s} tf\text{-}idf_{p,s} > 0 \\ 0 & \text{Otherwise} \end{cases}$$

The final measure of populism in a document  $s$  is the sum of the tf-idf for words that appear in each of the two dimensions  $e$  and  $p$ , if and only if both dimensions appear in the text. If one or both dimensions are absent, populism is set to zero. Results are robust to many variations of the populist measure, including the use of a single dimension, simple word frequencies, or the initial dictionary by Rooduijn and Pauwels (2011).<sup>5</sup> Appendix section 1.4 shows that the results are equally robust to alternative measures of populism, where machine learning classifiers are used to detect populism at the sentence level and document-level populism is the weighted average of those sentence-level scores.

In the appendix, we report all dictionaries at each step. Specifically, in Tables A2, A3, and A4, we provide examples of the most and least populist sentences in the corpus. We also report the most frequent semantic contexts around each of our dictionary words in Table A1. For example, we find that “corrupt” appears close to “govern”, “establish”, “Washington”, and “polit”. Additionally, we present descriptive evidence on the performance of our measure in capturing well-known features of the supply of populism, which is higher for non-incumbents and outsider candidates. Figure A1 shows the density of populism across campaigns, and insiders vs. outsiders: in all races, outsiders use more populism than insiders, and their variance of populism is greater. This is in line with the idea that outsiders can use populism strategically by varying its supply depending on the context. Finally, in Table A7, we provide supportive evidence that populism is negatively associated with linguistic complexity, serving as a proxy for effort in explaining political programs.

<sup>4</sup> This is meant to minimize measurement error due to the possible use of different stemming algorithms in Pauwels (2011) and in our corpus.

<sup>5</sup> Tables are available upon request. Bonikowski and Gidron (2015) propose an alternative dictionary of populism. While adherent to the minimal definition of populism, their method results in words that are specific to the case of American presidential campaigns. Because domain specificity can result in serious shortcomings when using dictionary-based methods (Grimmer and Stewart, 2013), we adopt the more neutral dictionary by Pauwels (2011). Still, results are fully consistent when we extend the analysis to populism in the presidential speeches using Bonikowski and Gidron (2015)’s measure, as reported in Table A9 in the appendix.

### 3.2. Main independent variables

We measure local economic insecurity as the change in manufacturing employment (Majlesi et al., 2020; Colantone and Stanig, 2018; Guiso et al., 2019). This captures disruptions from automation and globalization that have led to a displacement of manufacturing jobs, substituted by lower-paying and less secure jobs in the service sector (Autor and Dorn, 2013). Following this established literature, we augment our datasets with variables that capture the change in manufacturing employment over the 5 years preceding each election. Specifically, we compute manufacturing employment as the share of employment in manufacturing over total employment in the private sector for the election year  $t$  and  $t-5$ , and calculate the difference over five years. We collect employment data from the Quarterly Census of Employment and Wages (BLS) at the county-level for 2012–2017 and 2014–2019. We aggregate these data at the electoral district level by attributing to each district the population-weighted average of values for counties that overlap with the district.<sup>6</sup>

We define an outsider as a candidate who has never appeared as a political representative before (Barr, 2009). We code a variable with a value of 1 if the candidate was never elected to a public office before, and 0 otherwise. We retrieve this information from candidates’ campaign websites when available, or from *VoteSmart.org* and *Ballotpedia.org* otherwise.

The last element we need is a measure of the expected competitiveness of races. While competitiveness can be measured in different ways, ideally, we need to capture a credible signal of public expectations around the competitiveness of the race, which would inform candidates’ and voters’ expectations. For this reason, we adopt The New York Times’ public classification of electoral districts in both congressional campaigns.<sup>7</sup>

### 3.3. Econometric specification

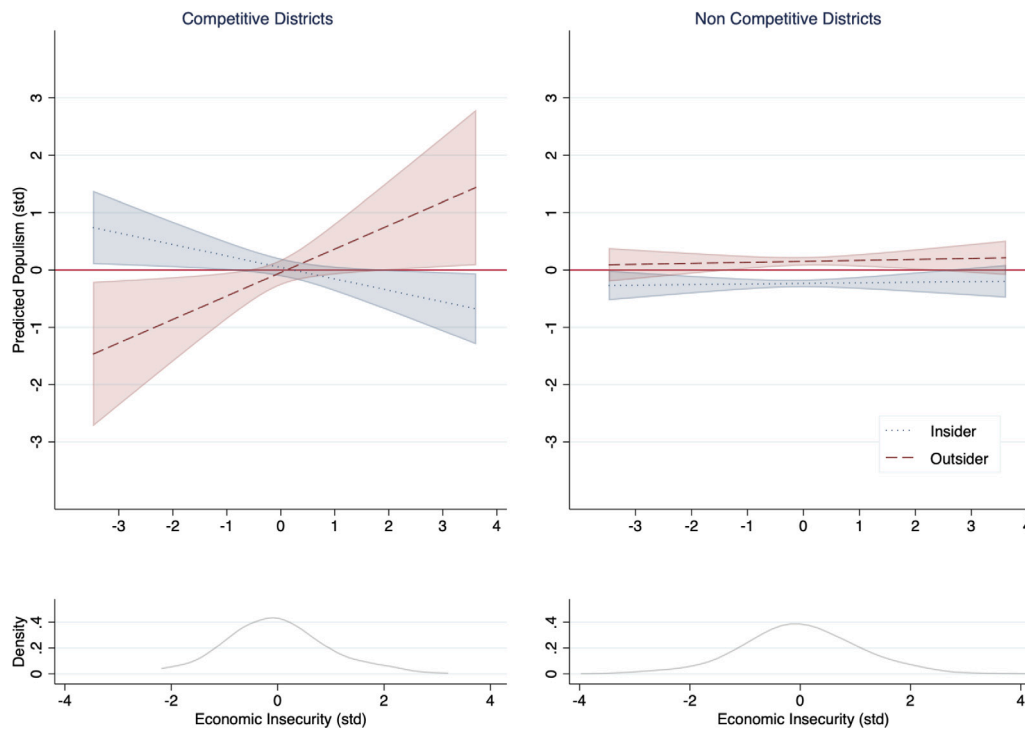
We analyze the strategic use of populist rhetoric during the 2018 and 2020 congressional campaigns by examining candidates’ electoral platforms as presented on their websites. Specifically, we regress the level of populism in a program on the outsider status of the candidate, economic insecurity in the electoral district, and the competitiveness of the race. We estimate the following regression model:

$$Pop_{iet} = \beta_1 Out_i + \beta_2 Comp_e + \beta_3 EcInsec_e + \beta_4 Out_i \times Comp_e + \beta_5 Out_i \times EcInsec_e + \beta_6 Comp_e \times EcInsec_e + \beta_7 Out_i \times Comp_e \times EcInsec_e + \mathbf{X}_{iet} \phi + \eta_t + \delta_e + \nu_{iet} \quad (1)$$

where  $Pop_{iet}$  is populism expressed by politician  $i$ , in electoral district  $e$ , and time  $t$ ;  $Out_i$  is politician  $i$ ’s outsider status;  $Comp_e$  is competitiveness of the race  $e$ ;  $EcInsec_e$  is economic insecurity in location  $e$ ;  $\mathbf{X}_{iet}$  is a vector of location and candidate characteristics. We also include election ( $\eta_t$ ) and state ( $\delta_e$ ) fixed effects so that we exploit variation within the same election and within the same state. Standard errors are clustered at the district level, corresponding to the level at which economic insecurity and political competitiveness are measured.

<sup>6</sup> Districts are generally larger than counties and district and county boundaries do not perfectly overlap. Hence, for each county we take the share of district population living in that county and use it as weight when imputing district values starting from counties. Population data are produced by the Missouri Census Data Center. A similar procedure is used in Majlesi et al. (2020).

<sup>7</sup> For 2018, see <https://www.nytimes.com/interactive/2018/03/26/us/elections/house-races-midterms.html>. For 2020, see [https://ballotpedia.org/U.S.\\_House\\_battlegrounds,\\_2020](https://ballotpedia.org/U.S._House_battlegrounds,_2020).



**Fig. 1.** Predicted populism in congressional campaigns. *Note:* Predicted *Populism* (standardized) for different levels of *Economic Insecurity* (standardized), for outsiders and insiders in competitive and non competitive districts. Predictive margins are estimated starting from the baseline model, as in Column 3 of Table 1. Density is the kernel density of *Economic Insecurity* in competitive and non competitive districts. The confidence intervals denote significance at 5% level.

#### 4. Results

In Table 1, we analyze the use of populist rhetoric among Democratic and Republican candidates for the House of Representatives in the 2018 and 2020 elections. In all regressions, we control for document length, as this may be correlated with local district characteristics and space allocation across different topics. We also control for candidates' gender, age, ethnicity, and education, as these features correlate with outsider status, characteristics of the race, and the use of populist rhetoric.<sup>8</sup>

In column (1), we regress populism on outsider status and show that outsiders, on average, use more populist rhetoric than insiders (*Out.*). This finding provides direct support for *H1*, which is further confirmed after controlling for the effects of economic insecurity and race closeness in the subsequent columns.

In column (2), we include a variable that captures economic insecurity in the electoral district (*Ec. Insec.*). The association between economic insecurity and populism suggests that while insiders do not adapt their rhetoric to local economic insecurity (the coefficient is an accurately estimated zero), outsiders may use more populist rhetoric in those same places. However, the weak positive association detected for outsiders does not reach statistical significance. In and of itself, economic insecurity does not appear to be a strong predictor of populist rhetoric.

Column (3) reveals that the non-significant coefficients in column (2) are due to heterogeneous effects across close and non-close races (*Comp.*). When running in non-competitive races, outsiders do not respond to economic insecurity with more populism. In these cases, the marginal effect of economic insecurity on populism is not statistically different from zero ( $\beta_3 + \beta_5 = 0.014$ ,  $se = 0.041$ ). This result is consistent with *H2*, which predicts the absence of a relationship between

economic insecurity and populism in such cases. However, when running in close races, outsider candidates use significantly more populist rhetoric in localities with higher economic insecurity. In other words, the marginal effect of economic insecurity on populism is positive and statistically significant ( $\beta_3 + \beta_5 + \beta_6 + \beta_7 = 0.408$ ,  $se = 0.185$ ), providing support for *H3*.

Fig. 1 shows the predicted level of populism across candidate types and race closeness, for different levels of economic insecurity. In competitive races (left panel), outsiders (dashed line) use more populist rhetoric when local levels of economic insecurity are higher. Specifically, they employ less populism than average in areas with low economic insecurity but heavily rely on populism in districts where economic insecurity is greater. Importantly, the plot reveals that outsider candidates only respond to economic insecurity when competing in tight races. In non-competitive races (right panel), outsiders use more populist rhetoric than insiders on average. However, the difference between the two does not vary based on the level of economic insecurity. The flat and parallel prediction lines indicate that candidates, regardless of type, do not react to local economic conditions when the race is not close. The bottom panel shows the density distribution of the economic insecurity variable for competitive and non-competitive districts, demonstrating that limiting the plots to regions with common support does not affect the results.<sup>9</sup> Overall, these results support our claim that populism is a rational campaign strategy that candidates carefully adjust to local conditions.<sup>10</sup>

<sup>9</sup> The distribution of economic insecurity varies slightly between competitive and non-competitive races, reflecting that competitiveness is influenced by local conditions. However, this consideration does not invalidate our results for two reasons: (i) in the regression tables, we control linearly for economic insecurity, competitiveness, and state/district fixed effects; (ii) restricting the plots to regions with common support leaves the results virtually unchanged.

<sup>10</sup> While outside the scope of this paper, we also report the predicted values of populism for insiders and find a weak yet negative correlation between

<sup>8</sup> Controlling for education also attenuates the concern that outsider status captures candidates' quality (Jacobson, 2004).

**Table 1**  
Local conditions and use of populism in congressional campaigns.

Dep. Var.	(1) Pop	(2) Pop	(3) Pop	(4) Pop	(5) Pop	(6) Pop	(7) Pop	(8) Pop	(9) Pop
Out.	0.340*** [0.055]	0.337*** [0.055]	0.401*** [0.059]	0.379*** [0.078]			0.433*** [0.061]	0.434*** [0.066]	0.371*** [0.076]
Ec. Insec.		-0.000 [0.039]	0.020 [0.041]	-0.049 [0.076]	0.014 [0.046]	0.029 [0.048]	-0.000 [0.040]	0.030 [0.044]	0.114* [0.067]
Out. × Ec. Insec.		0.043 [0.048]	-0.006 [0.051]	0.042 [0.104]			0.018 [0.050]	-0.016 [0.056]	-0.023 [0.066]
Comp.			0.286*** [0.089]	0.402*** [0.129]	-0.234* [0.123]	0.281*** [0.093]	0.264*** [0.095]	0.320*** [0.118]	0.148 [0.115]
Out. × Comp.			-0.488*** [0.139]	-0.801*** [0.216]			-0.463*** [0.144]	-0.484*** [0.166]	-0.353*** [0.167]
Comp. × Ec. Insec.			-0.213** [0.096]	-0.266 [0.191]	0.396** [0.187]	-0.190** [0.094]	-0.174* [0.100]	-0.202 [0.134]	-0.433*** [0.109]
Out. × Ec. Insec. × Comp.			0.606*** [0.198]	0.807** [0.329]			0.568*** [0.197]	0.795*** [0.154]	0.72*** [0.160]
Binary Ec. Insec.				Y					
Demo Controls	Y	Y	Y	Y	Y	Y	Y	Y	Y
Document length	Y	Y	Y	Y	Y	Y	Y	Y	Y
Election FE	Y	Y	Y	Y	Y	Y	Y	Y	Y
State FE	Y	Y	Y	Y	Y	Y	Y	Y	Y
District FE									Y
Sample	All	All	All	All	Only outsiders	Only insiders	Without new insiders	Only mixed races	All
Observations	1341	1341	1341	1341	686	655	1278	1048	1341
R-squared	0.24	0.24	0.26	0.26	0.29	0.27	0.26	0.28	0.53

Notes: The dependent variable is the standardized index of populism in each electoral program; *Out.* is a dummy equal to one for outsider candidates, 0 for insider candidates; *Comp.* is a dummy equal 1 for competitive districts, 0 otherwise; *Ec. Insec.* is the standardized change in manufacturing employment over the 5 years before each election. *Ec. Insec. bin.* is a dummy equal 1 for districts above the median of *Ec. Insec.* All regressions include controls for the length of the document (number of words), demographic controls (gender, age, ethnicity, education), state and election fixed effects. Column (9) also includes electoral district fixed effects. The full sample (*All*) includes all Democratic and Republican candidates running in contested congressional elections in 2018 or 2020. Column (4) uses a binary measure of economic insecurity (above/below the median). Column (5) only includes outsider candidates from the full sample, and column (6) only includes insider candidates. Column (7) excludes insider candidates that run as outsiders in the previous election round. Column (8) exclude races where candidates are all insiders or all outsiders. Standard errors are clustered at the electoral district level.

\* Denote significance at level of 10%.  
\*\* Denote significance at level of 5%.  
\*\*\* Denote significance at level of 1%.

In column (4), we dichotomize the economic insecurity variable to simplify interpretation. Specifically, *Ec. Insec.* is a binary variable that takes the value 1 for electoral districts above the sample median. Results show that our main coefficient of interest are largely not affected by this change. Columns (5) and (6) of Table 1 present separate results for outsiders and insiders. Once again, outsiders (insiders) use more (less) populism in response to economic insecurity when campaigning in competitive elections. Columns (7) to (9) further test the robustness of these results. In column (7), we exclude insiders who ran as outsiders in the previous election cycle and may not have fully transitioned to an insider campaign. As noted in the theory section, the populist strategy is less likely to be used as political experience increases and voters have more information on the candidates. Running our primary specification on this restricted sample yields very similar results. In column (8), we limit the sample to asymmetric (or mixed) races, where an outsider runs against an insider. Since insiders and outsiders pursue different strategies, we expect them to polarize along the populist dimension when competing directly against each other. The coefficients estimated in this restricted sample are larger, indicating a stronger strategic effect in asymmetric races. In column (9), we include electoral district fixed effects, controlling for district-level socio-demographic and political characteristics, such as average education and immigration.

populism and economic insecurity. While this may suggest an attempt at differentiation during the campaign, we also note that this correlation is not robust to further tests discussed below. We leave this empirical finding for future research.

#### 4.1. Additional robustness checks

In the appendix, we provide several important robustness checks. First, in Section 3, we extend the analysis to the 2016 presidential campaign and show that presidential candidates follow similar strategic considerations in their campaign rallies. Second, we rule out the possibility that our results are driven by linguistic complexity. In Table A7, we include a control for linguistic complexity (the type-token ratio in each document). Third, we examine whether the main results are solely driven by differentiation attempts by candidates facing particularly (non-)populist competitors. In Table A20, we demonstrate that the main results remain robust after controlling for the level of populism used by the direct competitor in the same electoral district. Fourth, we consider alternative definitions of economic insecurity. In Table A13, we replace our proxy for economic insecurity with perceptions measured in survey data. The demand for populism originates from material conditions affecting voters' perceptions of insecurity. Using perceptions from Gallup data (Gallup, 2008-2018), the results remain unchanged. We further demonstrate the responsiveness of populist rhetoric to local demand by substituting economic insecurity with a measure of distrust in the political system from Bellodi et al. (2023). Results from those regressions are reported in Table A15 and present a similar picture. Specifically, outsider candidates use more populist rhetoric when running in close races and in congressional districts with higher surges in political distrust. Then, in Table A17, we include dummy variables for the topics covered (e.g., party politics, welfare, etc.) to address concerns that candidates may be changing the content of their speeches in response to local conditions. Finally, we delve

**Table 2**  
Results by support for a populist presidential candidate.

	Democrats			Republicans		
	(1)	(2)	(3)	(4)	(5)	(6)
Out.	0.370*** [0.087]	0.467** [0.228]	0.327*** [0.093]	0.381** [0.094]	0.605*** [0.129]	0.191 [0.139]
Comp.	0.458*** [0.168]	0.140 [0.260]	0.527** [0.222]	0.162 [0.126]	0.209 [0.177]	0.155 [0.184]
Out. × Comp.	-0.593*** [0.205]	-0.724** [0.365]	-0.569** [0.265]	-0.529** [0.251]	-0.180 [0.278]	-0.914*** [0.338]
Ec. Insec.	-0.006 [0.061]	0.224* [0.117]	-0.084 [0.064]	0.011 [0.058]	-0.075 [0.076]	0.067 [0.078]
Out. × Ec. Insec.	-0.012 [0.066]	-0.065 [0.123]	0.010 [0.075]	0.073 [0.094]	0.182 [0.124]	-0.037 [0.142]
Comp. × Ec. Insec.	-0.199 [0.219]	-0.586* [0.335]	0.016 [0.304]	-0.109 [0.145]	0.120 [0.236]	-0.203 [0.198]
Out. × Ec. Insec. × Comp.	0.686** [0.292]	0.815* [0.482]	0.540 [0.355]	0.250 [0.310]	0.557* [0.312]	0.063 [0.266]
Sample	All	Pro-Sanders states	Not Pro-Sanders states	All	Pro-Trump states	Not Pro-Trump states
Observations	711	189	522	630	338	292
R-squared	0.31	0.42	0.31	0.27	0.33	0.27

Notes: The dependent variable is the standardized index of populism in each electoral program; *Out.* is a dummy equal to one for outsider candidates, 0 for insider candidates; *Comp.* is a dummy equal 1 for competitive districts, 0 otherwise; *Ec. Insec.* is the standardized change in manufacturing employment over the 5 years before each election. All regressions include controls for the length of the document (number of words), demographic controls (gender, age, ethnicity, education), state and election fixed effects. Columns (1)–(3) only includes Democrat candidates, and columns (4)–(6) only includes Republican candidates. The full sample (*All*) includes all democratic or republican candidates. Column (2) includes democratic candidates running in the 25 states with the highest vote share for Sanders in the 2016 primary election; column (3) includes democratic candidates running in the remaining states. Column (5) includes republican candidates running in the 25 states with the highest vote share for Trump in the 2016 primary election; column (6) includes republican candidates running in the remaining states. Standard errors are clustered at the electoral district level.

\* Denote significance at level of 10%.

\*\* Denote significance at level of 5%.

\*\*\* Denote significance at level of 1%.

deeper into how economic topics relate to the drivers of populism. It is possible that candidates speak more, or more aggressively, about the economy when campaigning in electoral districts that have experienced economic downturns. Appendix Section 4.5 shows that the main results hold even when economic topics are excluded from campaign documents, and that populism measured specifically within economic topics does not respond significantly to the three predictors of populism. We also show that candidates do not change their attention to economic topics in response to these usual three conditions. In conclusion, we can rule out that the results are driven by a simple correlation between the experience of economic insecurity and hostility toward economic topics on candidates' websites.

## 5. Additional results

This section presents two sets of additional results that support our main findings. First, we demonstrate that the primary results are driven by races conducted in locations where the electorate has previously shown a preference for populist candidates. This further confirms that candidates respond to signals indicating local demand for populist rhetoric. Second, an individual-level analysis of survey respondents supports the assumption that populist rhetoric involves a trade-off, mobilizing disillusioned voters at the expense of core party supporters.

### 5.1. Congressional campaigns and local support for populism

Our results highlight the role of local economic and political conditions in shaping candidates' campaign strategies. In this section, we further bolster our findings by showing that the populist strategy is more commonly pursued in locations where it is likely to be effective. Beyond local factors, the broader political context also affects candidates' incentives to use populism. Specifically, the popularity of presidential candidates provides insights into successful campaign strategies. Thus, we examine variations in local support for Donald Trump among Republicans and Bernie Sanders among Democrats to

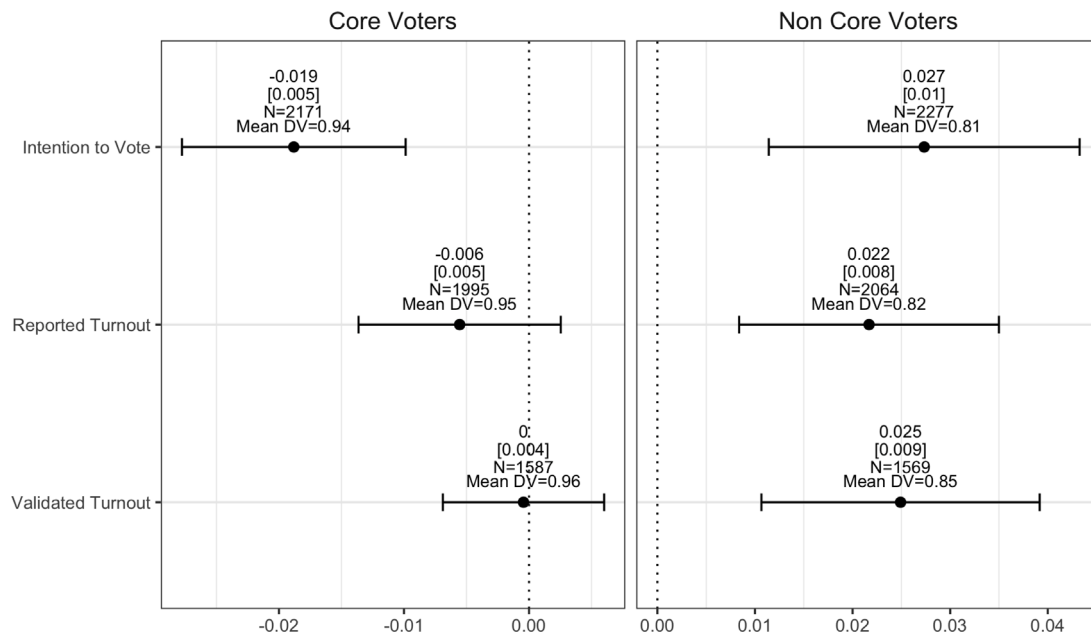
determine if Republican and Democratic candidates running for the House of Representatives adopt populist strategies in areas where these two presidential candidates are more popular.

To explore this, we investigate the heterogeneity in our baseline results across Republican and Democratic congressional candidates and in states characterized by varying local support for the respective populist presidential candidates. We quantify the popularity of Donald Trump and Bernie Sanders by utilizing the state-level vote shares they obtained in the 2016 primary elections. We define as *Pro-Sanders* (*Pro-Trump*) the 25 states where Sanders (Trump) achieved the highest vote shares.<sup>11</sup>

Table 2 presents the results. In column (1), we report our main specification estimated for all Democratic candidates. Next, we divide our sample between candidates running in pro-Sanders and non-pro-Sanders states. In the first case, our baseline results are confirmed: the positive and statistically significant coefficient of the triple interaction suggests that outsider candidates use significantly more populist rhetoric in localities with higher economic insecurity and close races (column 2). In the second case, however, candidates refrain from fully adopting the populist strategy: the estimated coefficient is positive but not statistically significant (column 3). Similarly, in column (4), we present our main specification estimated for all Republican candidates. We then divide the sample between candidates running in pro-Trump and non-pro-Trump states. Again, we find compelling evidence of a populist strategy in pro-Trump states (the estimated coefficient of the triple interaction is positive and statistically significant in column 5), whereas this effect is not observed in non-pro-Trump states (column 6).

Overall, candidates are more likely to strategically employ a populist platform in areas where the populist presidential candidate from

<sup>11</sup> Using primary results ensures consistent measurement for both candidates. In Table A16 of the appendix, we use a different measure of populist attitudes at the electoral district level. We utilize survey data and provide evidence that the results align with those presented in Table 2.



**Fig. 2.** Populism and Turnout. *Note:* Each coefficient is the association between a standard deviation increase in populism and turnout as in Eq. (2), for separate regressions. The dependent variable is declared Intention to Vote, Reported Turnout or Verified Turnout. Results are shown separately for *core* and *disillusioned* voters. The sample includes respondents with American citizenship, living in districts with contested and competitive races, who are either core voters or disillusioned registered voters. *N* indicates the sample size, *Mean DV* indicates the mean of the dependent variable in each sample. All regressions include socio-demographic controls and district and week fixed effects. Standard errors in squared parenthesis are clustered at the district-party level. The error bars are 95% confidence intervals.

the same political affiliation enjoys greater popularity. This heterogeneity provides a more nuanced understanding of the contextual factors that promote the use of populism. Furthermore, it reinforces our primary findings by illustrating that local economic and political conditions drive strategic populism specifically in regions where the electorate rewards populism.

## 5.2. Evidence on selective mobilization

Our theoretical expectations rest on the assumption that core voters are more likely to vote under traditional campaigning, whereas disillusioned voters are more likely to turn out under populist campaigning. In this section, we provide some preliminary evidence to support this assumption.

We integrate different data sources for the 2018 Congressional campaign. We use questions on party identification and intention to vote from the Cooperative Congressional Election Study (CCES) (Schaffner et al., 2019). The primary advantage of the CCES is that respondents are typically surveyed during and after the midterm campaign and are geolocated at the electoral district level. The district identifiers allow us to match each respondent to the level of populism expressed by their local party candidate in our dataset.

We define a Democrat as any respondent in the CCES who identifies with the Democratic Party on a seven-point scale, including strong Democrats, not-so-strong Democrats, and leaning Democrats. Similarly, we define Republicans (as in Hall and Thompson, 2018). Disillusioned voters are those who report weaker party identification.<sup>12</sup> Thus, we categorize respondents who identify as “Strong Democrats” or “Strong Republicans” as core voters, while weak partisans and leaners are

<sup>12</sup> This is a crucial aspect of the crisis of representation. Other factors, such as trust in politicians and anti-establishment views, are not captured in the CCES questionnaire. However, these three elements are closely related, both theoretically and empirically (Roberts, 2017; Hooghe and Oser, 2017; Hooghe, 2020; Meléndez and Rovira Kaltwasser, 2019).

considered non-core or disillusioned voters.<sup>13</sup> Since the model focuses on partisan mobilization, and in line with the rest of the article, independents are excluded from the sample.

We create a dummy variable that equals 1 if the respondent expresses a clear intention to vote in the 2018 midterm election.<sup>14</sup> However, the intention to vote and actual turnout can differ due to a range of factors (Achen and Blais, 2015). To assess the effects of populism on intended and verified mobilization, we also utilize self-reported turnout after the election and validated turnout (cross-checked against administrative data compiled by Catalist).

We apply the following regression model to respondents in competitive districts, dividing the sample between core and disillusioned voters:

$$Y_{i,d,p} = \alpha + \beta Pop_{d,p} + \gamma X_i + \rho_d + \tau_i + \epsilon_{i,d} \quad (2)$$

where  $Y_i$  is individual turnout, measured as intention, reported or validated;  $Pop$  is the level of populism expressed by the respondent's party candidate  $p$  in her district  $d$ ;  $X_i$  is a vector of individual socio-demographic controls;  $\rho_d$  are electoral districts fixed effects that control for all fixed local characteristics, including party organization, historical specificities, economic performance;  $\tau_i$  are week fixed effects to account for temporal campaign effects and closeness to the election. Because all party supporters in a district are exposed to the same level of populism, standard errors are clustered at the district-party level. The  $\beta$  coefficient indicates the average difference in the turnout (or intention) probability for two voters exposed to a one standard deviation difference in populism by their own party candidate. Fig. 2 reports the estimated coefficients.

For disillusioned voters, a one standard deviation increase in their candidate's populism leads to a 2.7 percentage point increase in turnout

<sup>13</sup> Weak partisans and leaners exhibit similar voting propensities (Keith et al., 1992; Pew Research Center, 2014).

<sup>14</sup> In response to: *Do you intend to vote in the 2018 midterm election on November 6?*



intention. For core voters, however, the relationship is reversed: a one standard deviation increase in populism results in nearly a 2 percentage point decrease. Interestingly, the positive effect of populism on turnout for disillusioned voters remains consistent across measures of turnout, influencing both intentions and actual voting behavior. However, the negative effect on core voters is less persistent: they initially express lower turnout intentions in response to populism but often end up voting anyway. This discrepancy is not surprising, as core voters are more likely to have developed a habitual pattern of voting (Plutzer, 2002), making them less susceptible to electoral stimuli (Gerber and Rogers, 2009). They also tend to have higher political efficacy, perceiving a cost to not voting (Finkel, 1985).

In terms of our theory, what ultimately matters is how politicians interpret these signals. Before the election, the negative effect of populism on turnout intentions suggests a potential electoral cost in the form of demobilizing core voters. Despite the absence of this penalty post-election, politicians remain uncertain about this cost beforehand and could reasonably expect it to be present. As long as uncertainty exists *ex ante*, the mechanisms proposed remain relevant.

Full regression results can be found in Table A21 in the appendix. The same Table also includes results from a pooled regression model, where populism is interacted with a variable indicating core voters. This shows that the difference between core and disillusioned voters in their response to populism is statistically significant. The results persist even after controlling for party affiliation and ideology, indicating that the effects are not limited to any particular party or ideology.

## 6. Conclusion

Using evidence from multiple electoral campaigns in the United States, this paper argues that populism is a strategic tool that political candidates can utilize to tailor their campaign strategies based on the characteristics of local audiences. Populist rhetoric mobilizes disillusioned voters while demobilizing core voters. As a result, it is most effective when economic insecurity creates a critical mass of discontent, and the competitiveness of the race ensures that increased turnout among disappointed voters pays off in terms of electoral outcomes.

These findings offer valuable insights into the study of populism. They reinforce the notion that populism is a strategic rhetorical approach that can vary in intensity both within and across campaigns. We enrich the existing debate by highlighting the contexts in which populism is more likely to be adopted by candidates seeking election. For two outsider candidates in different districts, local economic and political conditions will influence which candidate employs more populism. Meanwhile, an outsider candidate in an economically depressed area will refrain from using populism if the election is not competitive. The rise of populism has not marked the demise of conventional political rhetoric, but populist pandering has been recognized, particularly among outsiders, as a pathway to success.

This finding also serves as an important reminder that electoral campaigns, although responsive to voter preferences, are shaped by complex competing constraints. We have shown that the supply of populism is far from being a straightforward reflection of demand. Cultural and economic threats are well-documented in the literature as significant factors in the recent surge of support for populist parties. However, increased appeal for populist rhetoric does not automatically lead to more populist campaigns. Local conditions significantly shape candidates' strategies at the margin.

Even though presidential and congressional elections present candidates with fundamentally different campaign incentives, and despite the significant variations in general conditions across different elections, we have shown that our core findings remain consistent. Thus, we believe that similar conclusions can be validated in future research in other contexts. However, since our analysis is based on the incentives inherent in majoritarian elections, the theoretical and empirical frameworks will need substantial modifications when accounting for

electoral systems and party formation histories that require electoral competition to involve coalitions before or after elections.

We leave the development of a theory on insiders' behavior in highly populist races to future research. This endeavor will necessitate a dynamic assessment of how outsider politicians who have extensively engaged in populist campaigning gradually come to be perceived as insiders over time. We believe this analysis will yield valuable insights into insider behavior by exploring how initial political entry affects subsequent actions. The policy decisions of populists in power and their impacts are likely to vary significantly based on the context in which they operate. With the growing number of populists now holding power, this period presents a unique opportunity to investigate whether and how these former outsiders adjust to the loss of their outsider status.

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## CRediT authorship contribution statement

**Gloria Gennaro:** Conceptualization, Writing, Data Collection, Data Analysis. **Giampaolo Lecce:** Conceptualization, Writing, Data Collection, Data Analysis. **Massimo Morelli:** Conceptualization, Writing, Data Collection, Funding acquisition.

## Declaration of competing interest

The authors have no competing interests to disclose.

## Data availability

Replication materials are available here: <https://doi.org/10.7910/DVN/J8ZLIF>.

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## Appendix A. Supplementary data

Supplementary material related to this article can be found online at <https://doi.org/10.1016/j.electstud.2024.102853>.

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