The better, the worse? The macro-economic conditions for populist anti-immigrant success

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Abstract

The expanding literature on radical right populism has reached contradictory conclusions on the macro-level determinants of populist success, especially as regards macro-economic conditions. On the basis of theories of issue constraint, I show that the interaction between bad macro-economic performance and immigration pressure increases distributional conflicts associated with immigration, and subsequently turns political competition more unidimensional. The increased alignment between economic and immigration preferences minimizes ideological fragmentation, and favors the opportunity structure of conservative mainstream parties. The findings, obtained via a survey experiment in the US and large-N analyses in Western Europe, shed light on why countries particularly hit by economic crises are resilient against anti-immigrant parties. They also highlight the importance of redistribution preferences and political dimensionality to understand radical right fortunes.

1 Introduction

Populist radical right candidates have achieved unprecedented levels of success over the recent years, even in traditionally immune countries like Germany, the UK, and the US. The surprising but exiguous parliamentary presence that some radical right parties obtained from the 1980s onwards has now become larger and more widespread. This unforeseen level of popular support has allowed them to access office, shape policy, and credibly threaten some canonical principles of liberal democracy. Despite the overwhelming volume of scholarly research on radical right voting, the meso and macro-level determinants of such phenomenon are still poorly understood. This is why major events like Brexit, the Trump presidency, and the historical collapse of mainstream parties throughout the West are still felt like puzzling, unexpected, and shocking by many.

While scholars have reached an impressive consensus on the individual-level characteristics of the radical voter, the macro-level strand of the literature has not agreed on why anti-immigrant parties become a serious challenge in some countries and not in others, and on when this is supposed to happen (Kitschelt, 1995; Mayer, 2002; Norris, 2005; Mudde, 2007; Golder, 2016; Arzheimer, 2018). The effects of macro factors like the economy, immigration inflows, mainstream party strategy, the generosity of the welfare state, or electoral rules have been surprisingly inconsistent and disputed in previous literature. The media and many political experts (including academics) have been tempted to link the recent success of the radical right to bad macro-economic performance, especially in the wake of the Global Financial Crisis. This link, however, is difficult to reconcile with previous research documenting positive (Jackman and Volpert, 1996), conditional (Golder, 2003; Arzheimer, 2009; Dancygier, 2010), negative (Knigge, 1998; Arzheimer and Carter, 2006), and insignificant results of unemployment and other indicators of economic competition (Lubbers, Gijsberts and Scheepers, 2002). The link between the Global Financial Crisis and populist growth is also at odds with the fact that radical right parties have done well precisely in well-performing and highly redistributive economies

(like the German and the Swedish one), and at times when GDP growth and employment figures had substantially recovered (like in the US and the UK). Paradoxically, some countries particularly hit by the crisis (like Portugal, Spain, or Ireland) have proved to be particularly resilient to radical right appeals.

This article presents a new theory of issue constraint and argues that bad economic performance can change the dimensionality of the political space, and subsequently affect the fortunes of mainstream and populist parties. More specifically, the theoretical mechanism follows two steps. First, the interaction between economic hardship and high immigration levels reduces the ideological fragmentation of mainstream voters, who become more unanimously against economic redistribution and align their economic and immigration preferences more tightly. In other words, bad macro-economic performance in a context with moderate or high levels of immigration pressure should increase the conflict over economic redistribution and generate a more unidimensional pattern of ideological competition. Secondly, the lower ideological dispersion and higher alignment of economic and immigration attitudes generates more compact electorates that are easier to attract by mainstream parties. By contrast, when ideological fragmentation is high, populist parties can profit from the ideological divisions within mainstream electorates and conquer electoral spaces that are not represented by the mainstream.

This paper makes three contributions. First, it improves the understanding of why radical parties are more successful in some countries than others, which is a canonical and unresolved puzzle in previous research. The focus on redistribution preferences and the ideological constraint of voters is novel in the radical right literature, and sheds light on why some forms of poor macro-economic performance actually help to unite mainstream constituencies under a single ideological narrative (anti-state intervention and anti-immigration), and thus limit the political opportunity structure of populist anti-immigrant candidates. Our findings show that the theoretical mechanism holds across the whole income spectrum, but especially among higher-income voters. This confirms a higher malleability of economic preferences among higher income respondents (Rueda

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and Stegmueller, 2016), and a crucial role of the unity of center-right electorates (and not only disaffected working class voters, as commonly assumed) in explaining the success of anti-immigrant alternatives (Evans and Mellon, 2015).

Second, the focus on issue constraint improves our understanding of spatial voting theories of party competition. While standard Downsian accounts of new party emergence focus on the *average* ideological positioning of different actors in a given preference continuum (Meguid, 2005; Adams et al., 2006), the focus on the alignment of issue preferences (i.e. immigration and economic redistribution more specifically) proves particularly useful to understand post-industrial patterns of electoral competition (Carmines and Stimson, 1989; de Vries and Hobolt, 2012; Pardos-Prado, 2015). In fact, levels of issue constraint across countries do not perfectly map into levels party system fragmentation and polarisation, and therefore provide a novel perspective to the debate. A given electoral space can be more or less divided, independently from how ideologically extreme it is. Understanding the determinants of macro-levels of issue constraint is an important step forward in the analysis of new forms of electoral change.

Third, this paper reconciles high levels of internal and external validity by triangulating two empirical strategies. First, I present the findings of a survey experiment fielded in the US where primes on macro-economic performance and immigration pressure are randomized across a random probability sample of US-born respondents. The results of the experiment reveal that bad macro-economic performance and immigration causally increase anti-redistribution preferences and issue constraint (i.e. the unidimensionality of economic and immigration preferences). The mediation analysis performed in this section also shows that primes combining bad macro-economic performance and immigration pressure depress voting intentions for Donald Trump (in comparison to more mainstream candidates like Paul Ryan or John McCain) via increased levels of attitudinal constraint. The second empirical strategy relies on the cumulative file of the European Social Survey, and allows me to test my claims using individual and macro-level data covering 19 Western democracies between 2002 and 2014. The hierarchical and instrumental variables models

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presented in this section confirm that the interaction between negative performance and immigration levels increases levels of issue constraint, and that the subsequent unidimensionality of the political space harms the radical right in favor of mainstream parties.

2   The macro-economy and the dimensionality of the political space

2.1   Assumptions

The theory presented in this paper builds upon four assumptions. First, voters follow a spatial logic of political behavior and prefer to vote for the party closest to their own ideological ideal position (Downs, 1957; Adams et al., 2006). Despite the numerous extensions of and criticisms to the median voter theorem in which this spatial logic is based, the Downsian proximity model of vote choice is ubiquitous in the specialized literature and generally successful in its theoretical and empirical implications (Adams, 2012).

Second, the theory assumes a bi-dimensional structure of political competition, with an economic redistribution axis, and a socio-cultural axis composed of libertarian-authoritarian values, or inclusionary or exclusionary attitudes in the face of globalization (Kitschelt, 1995; Kriesi et al., 2008; Bornschier, 2010). Given that immigration and not social conservatism has been found to be the key issue dimension for radical right fortunes, I will focus on immigration positions as the main second dimension of competition (Arzheimer, 2018).

The assumption of spatial calculi and bidimensional structures of competition is quite extended in the empirical political behavior and radical right literatures. As opposed to most of previous work, however, the orthogonality of those two dimensions of competition

is not assumed here (Pardos-Prado, 2015). My third assumption is that voter positions on the redistribution and immigration dimensions are not fixed but malleable, and can be more or less aligned depending on contextual conditions described below. When issue positions are more aligned (i.e. a voter who has the same level of, say, moderately anti-redistribution and anti-immigration preferences), the pattern of competition becomes more constrained and unidimensional. In the opposite scenario, when those two issue positions become less aligned (i.e. a voter has a much more liberal pro-redistribution position than his own anti-immigration position), the pattern of competition becomes more bi-dimensional.

Figures 1 and 2 below illustrate two ideal scenarios of low and high issue constraint respectively, where each dot represents an individual voter. Issue constraint is defined as the degree of alignment between issue positions. In the scenario of high issue constraint in Figure 7b, the alignment between issue positions is high: both right-wing and left-wing electorates are very compact. This means that the distance between issue positions for a given individual and the aggregate ideological dispersion of that electorate is low. By contrast, low issue constraint means that the two issue positions are more independent and the dispersion of ideological positions is higher. In practical terms, a scenario of low issue constraint means that voters located towards the right and the left of the spectrum are quite divided in terms of economic and immigration preferences.

The fourth assumption is that parties have a strong office-seeking motivation and adapt their positions to the distribution of preferences emerging on the demand-side of the spectrum. While this assumption does not preclude that party strategies also shape the dimensionality of the political space, it implies that parties are ready to adapt their narrative to cater the preferences of the constituencies that can bring them closer to power. This implies that it is easier for a mainstream party to get closer to and attract the whole of a highly constrained electoral space, with high levels of homogeneity and very little ideological division. By contrast, even holding the average ideological position of parties and the electorate constant, it will be easier for a new populist entrepreneur to

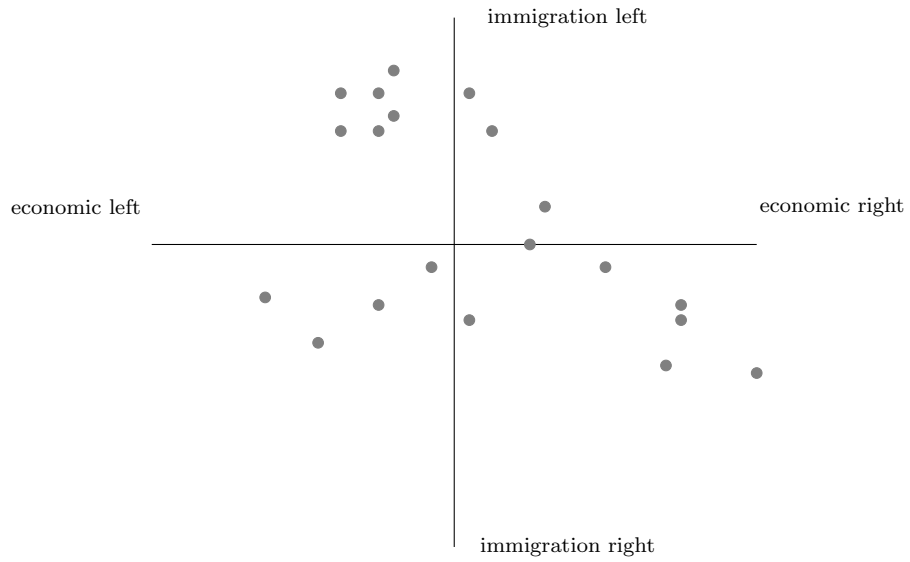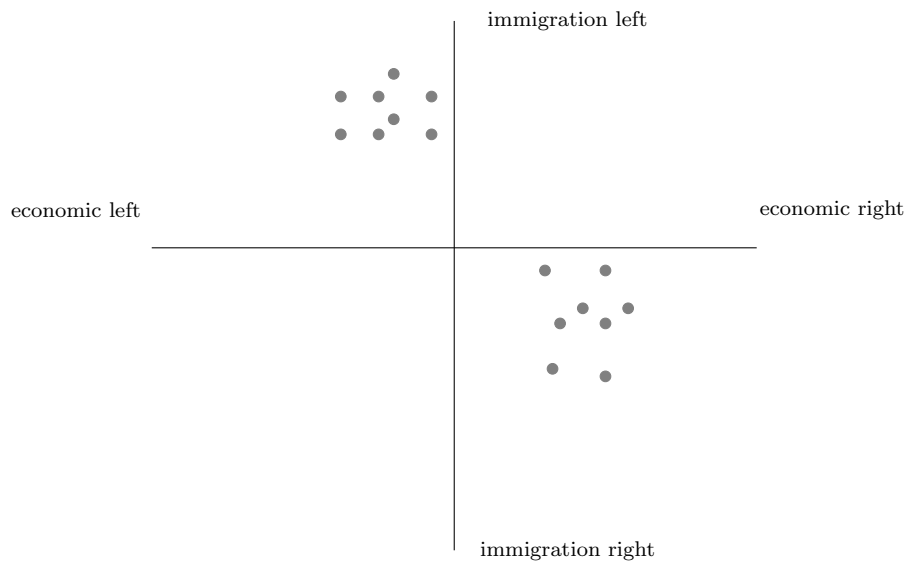Figure 1: **Low issue constraint**

Figure 2: **High issue constraint**

break into a highly fragmented political spectrum with low levels of constraint targeting a specific sub-group who is less well represented by the mainstream party.

2.2 From macro-economic performance to redistribution preferences and issue constraint

On the basis of our assumptions above, our main expectation is the following: regardless of the average position of electoral constituencies and how closely parties can match those average positions, unconstrained or dispersed ideological spaces favor populist parties, whereas constrained or compact spaces are more difficult to divide and provide a better opportunity structure for mainstream parties. This sub-section unpacks the mechanism further by outlining how macro-economic performance should modify the dimensionality of the political space.

Preferences for economic redistribution distinguish pro-market positions from positions in favor of state intervention in the economy, and are a key component in the political spectrum of advanced democracies. The literature on preferences for redistribution usually gravitates around the influential Meltzer-Richard model, focusing on self-interest and levels of income inequality as the main determinants of redistribution. Macro-economic volatility, in terms of economic crises or rising levels of unemployment, has also been considered in previous research (Alesina and Giuliano, 2011) Giuliano and Spilimbergo find strong and consistent effects of macro-economic scarcity during early adulthood on preferences for economic protection later in life. The effects of macro-economic scarcity have been associated with a socialisation effect whereby political preferences are articulated during one's formative years, and subsequently crystallize and remain consistent over time (Neundorf and Soroka, 2018).

Margalit (2013), however, shows that economic recessions can have a significant impact on current welfare policy preferences, also beyond socialization effects. By using panel data and different types of economic shocks, he finds that exposure to financial crises

substantially decreases confidence in employment security, and that the actual loss of jobs drives individuals to support more generous social policies. These findings are consistent with the mainstream of the economic voting literature and the idea that self-interest and expectations of economic security (both in sociotropic and egotropic terms) can be important drivers of preferences and political behaviour (Tilley, Neundorf and Hobolt, 2018).

While the previous contributions point out that economic scarcity can trigger pro-redistribution preferences to compensate for income or job losses, there are reasons to expect that things can change when scarcity occurs in a context of salient immigration pressure. As convincingly argued by Cavaille and Trump (2015), preferences for redistribution are not only shaped by material considerations focused on *who gives*, but also by other-regarding considerations based on the identity of *who benefits* from social benefits. Most of the political economy literature on this topic finds that immigration and ethnic diversity tend to be strong depressors of trust, generosity, and social policy preferences (Alesina and Glaeser, 2004). Despite some disagreements about the theoretical mechanisms, the relationship between diversity and lower preferences for redistribution and provision of public goods has been considered one of the strongest in contemporary political economy studies (Banerjee et al.).

It is thus reasonable to expect that when economic crises and aggregate unemployment take place in diverse contexts with high immigration levels, policy preferences can be driven by competition for resources with the out-group. This is consistent with a very established literature on ethnic competition theory, expecting distributional conflicts at the societal level to increase when both resource scarcity and out-group presence are high (Arzheimer, 2018)[1]. This expectation is consistent with work done at the local level showing that preferences for redistribution decrease when the share of welfare recipients

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[1]While economic competition theory would predict that the combination between bad performance and immigration levels should also exacerbate anti-immigrant attitudes in the population, recent research is growing skeptical of the exogeneity of economic determinants of immigration attitudes and the possibilities to manipulate them experimentally (Hainmueller and Hiscox, 2007). While I see stronger theoretical reasons to expect changes in the macro-economic environment to drive redistribution preferences, the theory presented here does not preclude that immigration attitudes are also affected.

from a different racial group increases (Luttmer). This leads to my first hypothesis:

H1: *In a context with high immigration levels, bad macro-economic performance will decrease preferences in favor of economic redistribution.*

Previous work on immigration and redistribution has suggested that social policy preferences are more elastic among richer individuals, and that the expectation summarized in H1 should be conditional on income. There is formal and empirical evidence that where immigration is unskilled, income is negatively correlated with pro-immigration preferences (Facchini and Mayda, 2009). In fact, the relationship between immigration and decreased welfare generosity has been found to be more prominent among richer individuals, who are more sensitive to immigration (Dahlberg, Edmark and Lundqvist, 2012). The reasons for that can be an increased fiscal burden on the rich given progressive taxation (Hainmueller and Hopkins, 2010), social insurance mechanisms to prevent future economic shocks (Iversen and Soskice, 2001), changing altruistic considerations depending on the social identity of the poor (Rueda, 2017), or non-economic externalities linked to economic inequality (Rueda and Stegmueller, 2016; Dimick, Rueda and Stegmueller, 2016). Disentangling which of the previous mechanisms is responsible for the effect of macro-economic volatility is still an open debate beyond the scope of this paper, but my second hypothesis builds upon these considerations and expects a higher malleability of redistribution preferences among the rich:

H2: *In a context with high immigration levels, bad macro-economic performance will decrease preferences in favor of economic redistribution, especially for richer individuals.*

The previous hypotheses have outlined some basic expectations on the effect of macro-economic turbulence and immigration levels on redistribution preferences. The

main determinant of mainstream-populist patterns of competition, however, concerns the dimensionality of issue preferences, which is defined by the alignment or constraint of those preferences.

economic and immigration preferences, and by the aggregate *dispersion* (and not only the *average*) of those positions. The main expectation here is that economic volatility and immigration pressure associates increased distributional conflicts with competition with out-groups. In that scenario, fewer voters can afford to be economically generous and culturally liberal, therefore decreasing the ideological fragmentation on the demand-side of the spectrum and increasing the alignment between anti-redistribution and anti-immigration preferences. The next hypothesis captures the testable observation of this argument, both at the individual and at the aggregate levels of analysis:

H3: *In a context with high immigration levels, bad macro-economic performance will increase voters' issue constraint between immigration and redistribution preferences, and will reduce the ideological dispersion of electorates.*

2.3   From issue constraint to radical right voting

The main expectation is that higher levels of issue constraint should increase the electoral prospects of conservative mainstream parties over radical right parties. This has an individual-level and a macro-level rationale.

From an individual perspective, the capacity of voters to integrate issues in a single dimension of competition has been considered as a key requirement for them to rely on spatial logics of voting. Earlier survey research in mostly Anglo-American democracies revealed a pessimistic portrait where voters did not seem to have consistent issue positions (Converse; Butler). Recent research on issue constraint, however, revealed that once measurement error in survey research is corrected, the levels of issue constraint and issue

voting can be much higher than what it was initially suspected (Ansolabehere, Rodden and Jr., 2008). According to political psychological research, the stronger the ideological constraint of an issue (i.e. immigration) into a general dimension of competition (i.e. economic redistribution), the more likely that issue is to have an electoral impact on the parties competing on that very same dimension (Sniderman, Crosby, and Howell 2000; Sniderman, Brody, and Tetlock 1991). This is because the association between a given issue attitude and another ideological axis structuring political competition allows voters to provide the attitude with political meaning, to make their preferences more salient, and to reduce the cognitive costs of linking their preferences to what it is offered on the supply-side of the political spectrum (Pardos-Prado, 2015). The benefits of a highly unidimensional anti-redistribution and anti-immigrant space should be targeted to center-right parties, which are already established in that primary dimension of competition and have proved to compete on similar issues to radical right parties (Bale, Meguid, Abou-Chadi)

The expectation that more constrained issue dimensions will favor mainstream party fortunes also has an aggregate party competition rationale. From a spatial perspective of competition, parties will target the median ideological position in the electorate. If the distribution of ideological positions is highly dispersed and unconstrained, it will be more difficult for a mainstream party to attract a divided constituency and easier for a populist party to break into the ideological spectrum and target an unrepresented space. This expectation is rooted in classical comparative politics theories expecting cross-cutting issues to favor the emergence of new party competitors (Lipset and rokkan), and in theories of *issue entrepreneurship* and *issue evolution* expecting new political entrepreneurs to mobilize conflict over a new issue dimension (Carmines and Stimson, 1989; de Vries and Hobolt, 2012). This leads to the last hypothesis:

H4: *High levels of issue constraint between redistribution and immigration preferences will increase the individual probability to vote for a mainstream conservative party over a*

radical right party.

It is important to highlight that the expectations above are based on the distribution or dispersion of ideological positions in a given electorate, and not on the average or median ideological position of that same electorate. The theory presented here expects populist anti-immigrant parties to do better in an ideologically dispersed and fragmented scenario, and not necessarily in an ideologically extreme scenario. In fact, an ideologically extreme but compact scenario would again be easier for a mainstream party with a correspondingly tougher ideological stance. The fact that populism can emerge in electorates that are not necessarily very xenophobic or anti-redistribution on average fits an emerging view considering populist tendencies as part of a *pathological normalcy* compatible with mainstream values and not only extreme electorates (Mudde, 2010).

3 Survey experiment

3.1 Design

I follow two empirical strategies, focusing on internal and external validity respectively. The first strategy consists of a 2x2 survey experiment randomizing primes on economic performance and immigration. The survey was fielded with Qualtrics to a random probability sample of 1,050 US citizens. To approximate a representative sample of the population, soft quotas on gender, age groups, US state, and race based on US Census Bureau data were used[2]. The survey was in the field from 16 November 2017 to 12 December 2017.

Table XX in the Appendix reports the wordings of the 4 vignettes that were randomly assigned: positive economic prospects, positive economic prospects and rising immigration levels, negative economic prospects, and negative economic prospects and

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[2]https://www.qualtrics.com

rising immigration levels. The macro-economic and demographic information highlighted in the vignettes is based on different independent studies that are publicly available[3].

The first dependent variable measures economic redistribution preferences, and had the following wording: 'Income and wealth should be redistributed towards ordinary working people'. The answer categories go from completely agree (value 0) to completely disagree (value 4), and allowed respondents to place themselves on a fine-grained continuous scale in between cardinal values with a slider. The second dependent variable measures attitudes towards immigration: 'Do you think that too many immigrants have been let into the country or not?'. The answer categories were again coded in a continuous 0-4 scale from leftist to rightist positions. The third dependent variable, issue constraint, is the absolute difference between redistribution and immigration preferences. The scale has been reversed so that lower values correspond to higher distances between issue preferences (i.e. low level of constraint or alignment), and higher values to lower distances between issue preferences (i.e. high level of issue constraint or alignment). The following equation summarises the issue constraint variable:

$$constraint = -|redistribution - immigration| \qquad (1)$$

The last set of dependent variables to be analyzed are the subjective probability to vote for different candidates. More specifically, the wording was: 'We have a number of candidates that may run or have run for President of the US. How probable is it that you will ever vote for a candidate like the following?'. Answers were coded in fine-grained continuous 0-10 scales from lower to higher probabilities. The candidates were Donald Trump, Paul Ryan, John McCain, Hillary Clinton, Barack Obama, Bernie Sanders, and Sarah Palin. Finally, the survey also asked for basic demographics that we include as pre-treatment controls in

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[3]http://www.oecd.org/unitedstates/united-states-economic-forecast-summary.htm
http://www.pewresearch.org/fact-tank/2015/10/05/future-immigration-will-change-the-face-of-america-
https://www.nytimes.com/2017/07/06/business/economy/united-states-economy-gdp-trump.
html
http://www.investopedia.com/articles/economics/12/okuns-law.asp

some model specifications: gender (where the value 1 is female), age, years spent in formal education, and race. When testing conditional effects on income, we use a subjective perception of how bad or good the respondent perceives her own household income in comparison to other households (from 0 to 4). Previous research shows that individuals do not always perceive correctly their own relative standing in the income distribution (Balcells et al.), which means that objective income measures are not always suitable to capture self-interested approximations to redistribution attitudes. Subjective perceptions allow me to tap more directly on feelings about relative affluence or deprivation, which are the ones assumed to drive economic preferences.

The analytical strategy will first consist of using preferences for redistribution, immigration, issue constraint, and candidate evaluation as dependent variables, and our treatments as independent variables. If H1 and H3 are correct, the treatment on negative economic conditions and immigration should significantly reduce preferences for redistribution, and increase issue constraint. If H2 is correct, these effects should be stronger for richer individuals.

Finally, we test H4 with mediation techniques developed by Imai and colleagues. This mediation analysis implemented here tests whether the effect of our treatment of interest on populist voting operates through increased levels of issue constraint. The first step of this analysis will consist of showing that our treatment significantly *increases* issue constraint, and that issue constraint significantly *decreases* the probability to vote for a populist anti-immigrant candidate over a mainstream conservative candidate. I consider Donald Trump as a populist anti-immigrant candidate with a radical right rhetoric, and Paul Ryan and John McCain as conservative mainstream candidates. The third step consists of estimating the Average Causal Mediation Effect (ACME), which is the difference between the expected value of the outcome as a function of the predicted values of the mediator when the treatment is 1, and the same value as a function of the mediator when the treatment is 0. If H4 is correct, the ACME on Trump voting over mainstream voting should be negative and significant. This would mean that the indirect effect of

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bad performance and immigration pressure via increased issue constraint reduces the probability to vote for Trump. More formally, the ACME of our treatment T is expressed as follows:

$$\delta(T) = Y(T, Issueconstraint(1)) - Y(T, Issueconstraint(0)) \qquad (2)$$

3.2 Results

Figures 3a, 3b, and 3c plot the coefficients of our treatment effects on redistribution preferences, immigration attitudes, and issue constraint, on the basis of three different fully specified OLS models (see Tables XX in the Appendix for the full models, showing that the results remain unchanged with or without pre-treatment controls). Consistently with H1, when priming on bad macro-economic performance and immigration (and in comparison with good performance, the reference category), redistribution preferences move significantly towards more rightist and pro-market positions on average. While there are no significant effects on immigration preferences, Figure 3c validates H3 by showing that issue constraint also increases in a scenario of negative performance and immigration pressure. This means that the alignment between economic and immigration preferences increases when economic and immigration pressure come together, but that the effect is mostly driven by economic preferences becoming more consistently rightist.

Figure 3: **Average Treatment Effects on preferences**

(a) Redistribution   (b) Immigration   (c) Issue constraint
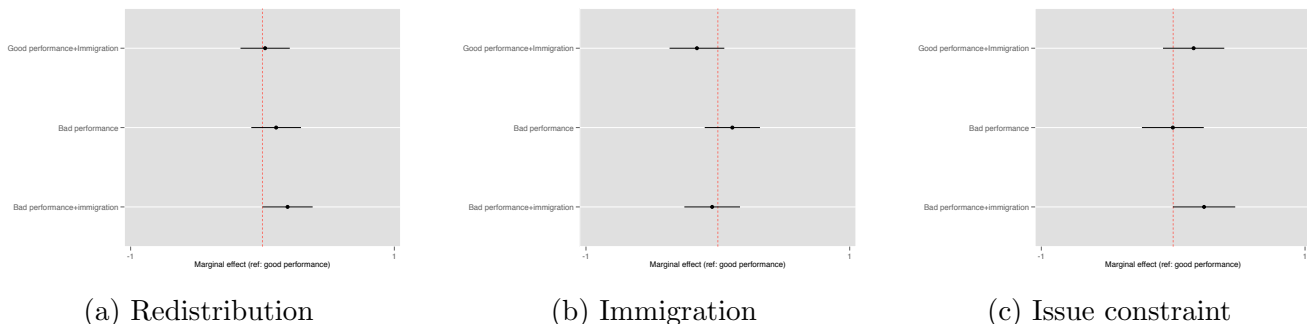
Figures 4a, 4b, and 4c replicate the same analyses but splitting the sample between

high relative income (above 2 in a 0-4 scale capturing how better the respondent's household income stands in comparison to other households), and low relative income (below 2 on the same scale). Interestingly, the results show that the treatment of interest, bad macro-economic performance with immigration, increases rightist economic and immigration preferences for the rich, but not for the poor. This means that the average effect found above on redistribution preferences was mostly driven by respondents considering themselves on the higher end of the income distribution. Despite the resilience of immigration attitudes to be manipulated experimentally with economic primes in previous research, and despite the lack of average treatment effects found above, Figure 4b shows how the combination between economic turbulence and immigration pressure makes the rich more anti-immigrant. Consequently, Figure 4c reveals that the alignment between economic and immigration preferences among the rich is also higher when exposed to the same prime. In scenarios of economic turbulence and ethnic diversity, the attitudinal pattern of affluent constituencies becomes more homogeneously right-wing.

Figure 4: **Treatment Effects on preferences conditional on income**

(a) Redistribution   (b) Immigration   (c) Issue constraint
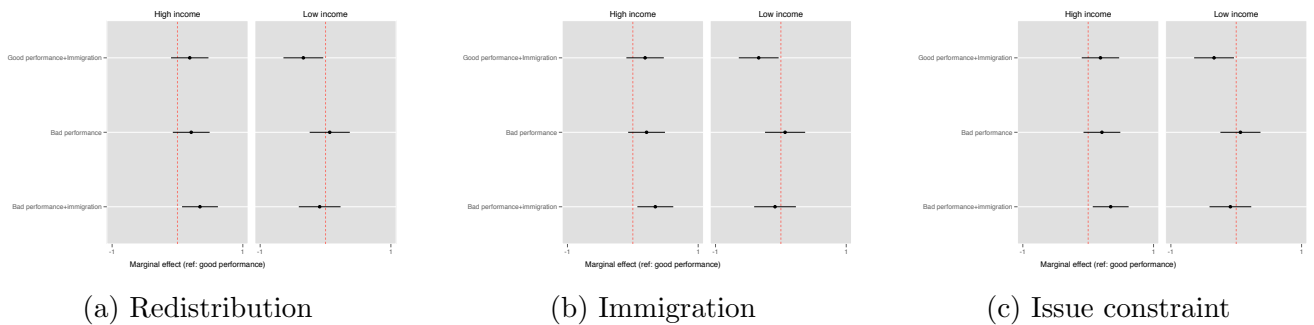
Figures 5a and 5b summarize the effects of the treatments on vote intentions. More specifically, the dependent variable is the difference between the subjective intention to vote for Trump minus the subjective intention to vote for the mainstream Republican candidates included in the survey (Ryan and McCain respectively). The resulting scale goes from -10 (i.e. the respondent is much more likely to vote for the mainstream candidate) to 10 (i.e. the respondent is much more likely to vote for Trump). As expected by H4 and contrary to common wisdom, the treatment of interest (economic turbulence

and immigration) has a negative effect on Trump vote intentions. However, the effects are not precisely estimated and fail to reach statistical significance. The same happens when conditioning on relative income. For both poorer and richer respondents, exposure to this treatment depresses populist over mainstream vote intentions, but the effects are not quite significant.

Figure 5: **Average Treatment Effects on voting intentions**
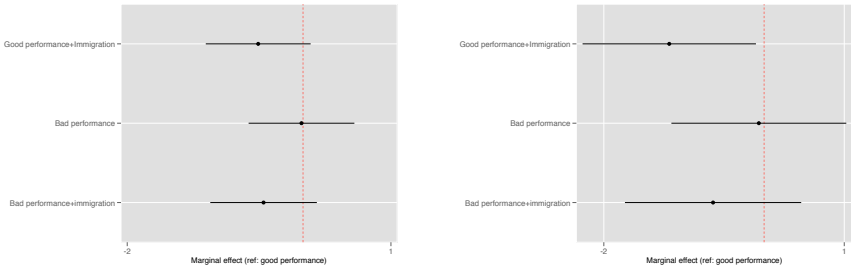
(a) Donald Trump - Paul Ryan   (b) Donald Trump - John McCain

There are two further interesting results in the experiment. First, the treatment on good economic performance and immigration reduces the probability to vote for Trump in favour of John McCain, especially for poorer respondents. Second, the only treatment that generates opposite effects for richer and poorer individuals is bad performance (without priming immigration). In scenarios of economic turbulence, low-income respondents are more likely to vote for Trump over the two mainstream candidates, while high income respondents are less likely to vote for Trump. The latter effects, however, are not precisely estimated.

Figure 6: **Treatment Effects on voting intentions conditional on income**
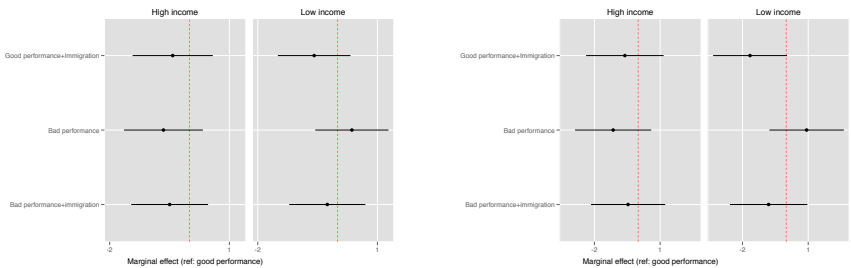
(a) Donald Trump - Paul Ryan   (b) Donald Trump - John McCain

Finally, our key argument relies on an indirect effect of negative macro-economic

performance and immigration pressure on Trump voting, via issue constraint. Table 1 summarizes the results of the mediation analyses testing these expectations. The first and third columns validate the first requirement, already shown above, and confirm that our treatment of interest (in comparison to the reference category) significantly increased levels of unidimensionality or alignment between redistribution and immigration preferences. The second and fourth columns also confirm that levels of issue constraint significantly reduce the probability to vote for Trump over the two mainstream Republican candidates included in the analyses. Finally, and crucially for the validation of the hypothesized indirect effect above, the lower panel of the table shows negative and significant ACME's for both dependent variables. This means that the indirect effects of the treatment via issue constraint significantly reduces the electoral prospects of Trump, and benefits those of Ryan and McCain. When comparing the relative magnitudes of the indirect and direct effects of the treatment on voting, the indirect issue constraint effect accounts for a fourth of the direct effect of Trump vs. Ryan voting, and for a third of the direct effect of Trump vs. McCain.

Table 1: **Mediation analysis: treatment effects on voting intentions via issue constraint**

	Trump-Ryan		Trump-McCain	
	DV: issue constraint	DV: voting intention	DV: issue constraint	DV: voting intention
Treatment	0.21* (0.12)	-0.39 (0.29)	0.21* (0.12)	-0.6 (0.55)
Issue constraint		-0.39*** (0.1)		-0.83*** (0.2)
Pre-treatment controls	YES	YES	YES	YES
Adjusted R2	0.02	0.06	0.02	0.1
N	551	551	551	551
ACME	-0.09* [-0.2, 0.01]		-0.17* [-0.41, 0.02]	
Direct effect	-0.39 [-0.94, 0.17]		-0.6 [-1.7, 0.5]	
Total effect	-0.47 [-1.03, 0.09]		-0.77 [-1.88, 0.34]	

4   Large-N analysis

The individual-level data used in this section comes from the cumulative file of the European Social Survey (ESS), containing seven complete rounds: 2002-2003, 2004-2005, 2006-2007, 2008-2009, 2010-2011, 2012-2014. The ESS data is very much used in academic

research due to its high standards of item validity, reliability, and comparability across countries[4]. It is also particularly appropriate for this specific research, given that it contains items measuring redistribution and immigration attitudes covering a large range of countries and years, in a way that other cross-national datasets also well suited for electoral behavior studies don't. In our analyses, individuals are nested in elections, which we treat as our level-2 unit. Elections correspond to the country-year combination that was fielded immediately after a national legislative election took place in that given country[5]. The number of elections is thus lower than the number of country-year pairs in the ESS cumulative dataset, which allows us to be more conservative in our election-level estimates and avoid inflating our N with country-year pairs that refer to the same election[6].

The first hypothesis expects that the interaction between immigration levels and bad macro-economic performance should increase redistribution preferences and issue constraint. Following previous research on the topic, attitudes towards redistribution are measured via the agreement with the statement that the government should intervene in the economy to reduce income levels. Responses are coded into 5 categories, from 'agree strongly' (most leftist position) to 'disagree strongly' (most rightist position). The variable capturing attitudes towards immigration is an additive index of three 0-10 scales (recoded from leftist to rightist anti-immigration positions) measuring respondents' opinions on whether (1) immigration is bad or good for the country's economy, (2) the country's cultural life is undermined or enriched by immigrants and, (3) immigrants make the country a worse or better place to live. A Cronbach's alpha reliability coefficient of 0.85 for the three items above indicates that the questions are measuring the same underlying concept or latent variable (i.e., attitudes towards immigration). The individual-level variable capturing issue constraint is operationalized in the same way as in the experiment,

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[4]http://www.europeansocialsurvey.org (14/04/2018)

[5]See Table XX in the Appendix for the correspondence between ESS country-year wave and the national legislative elections included in the analyses

[6]We restrict our analyses to Western European democracies, thus excluding Israel, Turkey, Russia, and post-communist countries. This allows us to increase unit homogeneity in our level-2 analyses. Moreover, previous research has shown that the dimensionality of the political space in post-communist countries is different to that of Western European countries, which could be very consequential for the applicability of an argument based on the alignment of dimensions and issue positions.

with the **absolute value of the distance between a respondent's redistribution and immigration attitude**, recoded from more distant values to more proximal ones. The economic and immigration scales have been standardized from 0 to 1 before being subtracted.

We replicate our analyses with aggregate-level indicators of ideological fragmentation, which are respectively measured with the **standard deviation of redistribution and immigration attitudes** in the electorate. The main independent variables in this first set of analyses are the interaction between immigration and different macro-economic indicators, which have been downloaded from OECD datasets. The specific macro-economic indicators used are **annual GDP contraction** (which is essentially the reversed of GDP growth), the **unemployment rate** (as the share of the active population), and **public debt** (as the share of GDP). Immigration is measured as the stock of foreign-born population in the corresponding country-year.

We include a set of exogenous individual-level controls: **years of education**, **gender**, **age**, and **household income**. Apart from the macro-economic indicators mentioned before, we also control for **trade opennes** of the economy (the sum of imports and exports, as the share of GDP) and **total social expenditure** (share of GDP)[7].

The last hypothesis expects high levels of issue constraint to decrease the probability to vote for radical right parties. In this case, the independent variables are the issue constraint measures and the control variables described above. The dependent variables used in this second set of analyses are recodifications of the individual vote recall in the last national general election. On the basis of Mudde (2007) and the Chapel Hill Expert Survey[8], parties have been classified into the following families: anti-immigrant or radical right, mainstream right (including conservative, liberal, christian-democratic, and confessional parties), mainstream-left (including social-democratic parties), radical left, green, regionalist, and agrarian. The three specific dependent variables that I use in

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[7]See all the descriptive statistics in Table XX in the Appendix.
[8]http://chesdata.eu

different stages of the analyses are: radical right voting vs. all other parties, radical right vs. mainstream right, and radical right vs. mainstream left[9].

I fit a number of hierarchical random effects models where individuals (level 1) are nested in elections (level 2), in order to obtain accurate standard errors and significance levels for the coefficients regarding higher-level variables (Hox, 2010). I also present several two-step hierarchical models testing the expectations at the aggregate level. This is a more parsimonious and conservative strategy that focuses on elections as units of analyses, and relaxes the assumptions of the independence of error terms and the random effects of the models presented in the first place (Snijders and Bosker, 2012). Following (Achen, 2005), radical right vote recall is first regressed in an unconditional model, and the random-intercept is saved. This intercept (capturing the average log odds of radical right voting in each election) is then used in a second stage as a dependent variable, and regressed on the aggregate measures of constraint and subsequent controls.

In terms of modelling strategy for the 2-step hierarchical models, I fit a number of Feasible Generalized Least Squares (clustering elections within countries) in order to correct for possible heteroskedasticity problems that sample biases could introduce in level-2 relationships (Lewis and Linzer 2005). In order to correct for the uncertainty incorporated in the estimated quantities of interest in the first stage of the analysis, I also replicate all the analyses with OLS regressions with bootstrapped standard errors (500 replications), obtaining virtually identical results.

Endogeneity concerns are a paramount concern in this research design. Both macro-economic performance and immigration inflows could reinforce each other, and both could also be influenced by the strength of populist parties conditioning public policy, which is essentially captured in our vote choice dependent variables. The product between economic performance and immigration could also be caused by unobserved political and economic sources of instability also driving populist success. Even if the

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[9]See Table XX in the Appendix for a complete list of parties and their corresponding party families included in the analyses.

purpose of the experiment above was to focus on the internal validity of my claims, I further deal with endogeneity concerns in the aggregate-level analyses with two-stage least-squares regression models (2SLS) with instrumental variables. Following previous research, I instrument macro-economic performance with variation in oil prices (the annual growth in oil import price in US dollars per barrel) (Raphael and Winter-Ebmer 2001, Levitt 2001). Subsequently, I instrument immigration stocks with the inverse of the distance between the host country and the country of origin of the biggest immigrant group (capital to capital distance). I focus on the biggest immigrant group, since immigration is more likely to countries with bigger stocks and denser networks of co-nationals. A shorter geographical distance is assumed to facilitate and increase immigration flows. Table XX in the Appendix shows satisfactory first-stage regression estimates of our instruments significantly predicting our endogenous variables, and satisfactory F statistics way above the conventional threshold of 10 ruling out the possibility of a weak instruments problem.

4.1 Findings on individual-level issue constraint

Table 2 presents 3 fully specified hierarchical linear models predicting the degree of individual issue constraint, where lower values indicate a larger distance between the two issue positions, and higher values indicate higher values of constraint. The main independent variables of interest are the interactions between foreign-born population and annual GDP contraction (model 1), unemployment rate (model 2), and public debt (model 3). As shown in Table 2, the three interactions are positive and highly significant. This means that when both immigration and poor performance increase, the dispersion of issue preferences decreases, and economic and immigration preferences become more consistent and aligned.

Figures 7a, 7b, and 7c show the marginal effects[10] of macro-economic indicators across levels of foreign-born population, both for low and high income respondents[11]. Despite the consistent average effects shown in 2, this set of figures reveals that the effects are mainly driven by high income respondents. While the effects of the three economic indicators are strong and significant for high income respondents, they are only significant and slightly weaker when looking at the effects of unemployment among lower income respondents.

Figure 7: **Marginal effects of macro-economic performance on issue constraint across income levels**

(a) Annual GDP contraction   (b) Unemployment rate   (c) Public debt
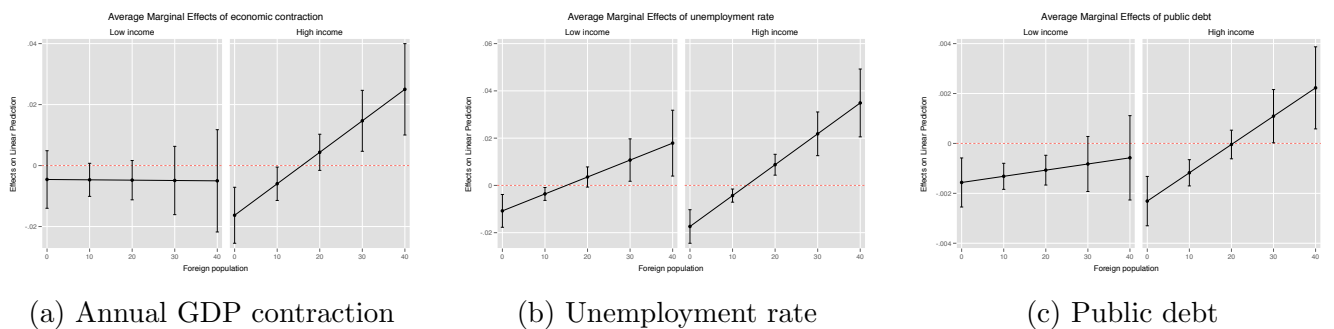
The subsequent figures analyze the extent to which the effects of macro-economic

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[10]See Tables XX in the Appendix for the fully specified models.

[11]Low and high income respondents refer to individuals below and above the median income value in the corresponding country-year group.

Table 2: **Hierarchical Linear Models predicting individual issue constraint**

	Model 1	Model 2	Model 3
Education	0.005***	0.005***	0.005***
	(0.00)	(0.00)	(0.00)
Gender	0.002	0.002	0.002
	(0.00)	(0.00)	(0.00)
Age	-0.001***	-0.001***	-0.001***
	(0.00)	(0.00)	(0.00)
Income	0.003***	0.003***	0.003***
	(0.00)	(0.00)	(0.00)
GDP contraction	-0.014***	-0.003	-0.001
	(0.00)	(0.00)	(0.00)
Foreign population	0.002**	-0.006***	-0.003**
	(0.00)	(0.00)	(0.00)
Unemployment rate	-0.002	-0.015***	-0.002
	(0.00)	(0.00)	(0.00)
Public debt	-0.001***	-0.001***	-0.002***
	(0.00)	(0.00)	(0.00)
Trade openness	0	-0	0.000
	(0.00)	(0.00)	(0.00)
Social expenditure	0.003	0.003**	0.003*
	(0.00)	(0.00)	(0.00)
GDP contraction*Foreign	0.001***		
	(0.00)		
Unemployment * Foreign		0.001***	
		(0.00)	
Public debt * Foreign			0.0001***
			(0.00)
Intercept	0.582***	0.689***	0.662***
	(0.05)	(0.05)	(0.05)
Election intercept variance	-3.491***	-3.568***	-3.481***
	(0.11)	(0.11)	(0.11)
Individual intercept variance	-1.574***	-1.574***	-1.574***
	(0.00)	(0.00)	(0.00)
N individuals	65099	65099	65099.000
N elections	44	44	44
Log Likelihood	10024	10027	10023
BIC	-19892.3	-19898.8	-19891.4

performance on issue constraint levels are explained by redistribution and/or immigration preferences changing their position. Figures 8a, 8b, and 8c show the marginal effects of the hypothesized interaction between immigration levels and macro-economic performance on attitudes towards redistribution (with higher values of the dependent variable indicating more pro-market positions against governmental intervention in reducing income inequality)[12]. This set of figures reveals that only the interaction between unemployment and immigration pushes individuals towards more rightist and anti-redistribution positions, especially among higher income respondents. By contrast, the effects of macro-economic performance on attitudes towards immigration is never significantly different from zero. If anything, the collusion between a contraction in GDP at high immigration levels increases anti-immigrant attitudes of lower income respondents, but the effects are barely significant at conventional levels.

Figure 8: **Marginal effects of macro-economic performance on redistribution preferences across income levels**

(a) Annual GDP contraction (b) Unemployment rate (c) Public debt
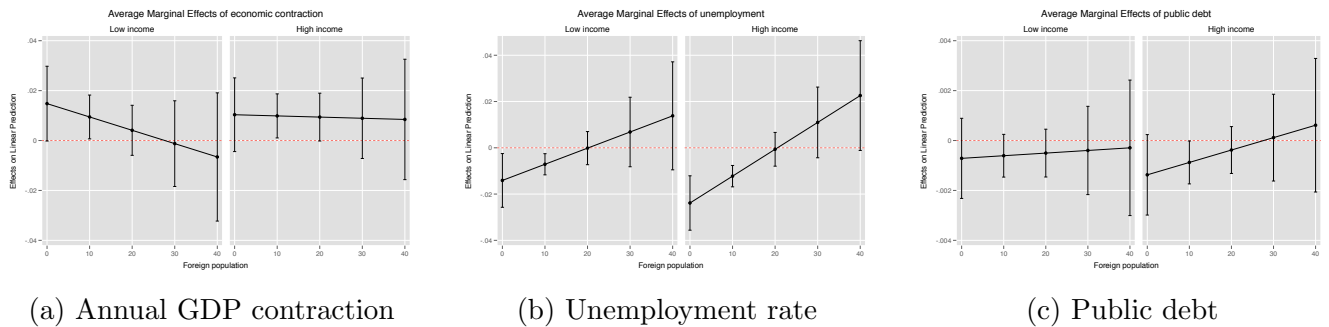
The first set of analyses reveals that bad macro-economic performance, together with immigration levels, increases the ideological alignment between redistribution and immigration preferences. The effects are significant on average, but stronger among middle-high and high income strata. These effects seem to operate through a reduced dispersion of issue positions, rather than through changes in the average position of redistribution and immigration attitudes. Only the interaction between unemployment and immigration could push voters towards more anti-redistribution positions. By contrast, macro-economic performance was unable to significantly shape attitudes towards

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[12]See Tables XX in the Appendix for fully specified models.

immigration, which seem to be less malleable and presumably more rooted in stable values.

Figure 9: **Marginal effects of macro-economic performance on immigration attitudes across income levels**

(a) Annual GDP contraction   (b) Unemployment rate   (c) Public debt
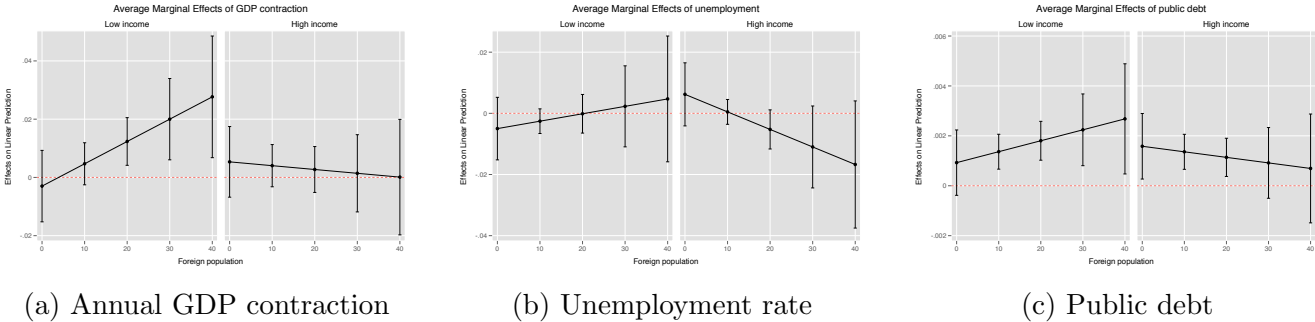
I turn now to the analysis of vote choice. Table 3 reports three hierarchical logit models predicting radical right voting with three different reference categories: all other parties, mainstream right parties, and mainstream left parties. As expected, the effect of issue constraint is negative, robust, and highly significant. Tables XX and Figures XX in the Appendix show that these effects are equally strong and consistent among low and high income respondents.

Table 3: **Hierarchical Logit Models predicting anti-immigrant populist voting**

	Populist vs. all	Populist vs. mainst right	Populist vs. mainstr left
Issue constraint	-1.397***	-1.261***	-1.361***
	(0.10)	(0.11)	(0.12)
Years of education	-0.117***	-0.139***	-0.090***
	(0.01)	(0.01)	(0.01)
Gender	-0.519***	-0.470***	-0.602***
	(0.04)	(0.05)	(0.05)
Age	-0.014***	-0.017***	-0.017***
	(0.00)	(0.00)	(0.00)
Low income (ref: median)	0.101*	0.171***	0.043
	(0.06)	(0.07)	(0.07)
High income (ref: median)	-0.364***	-0.548***	-0.257***
	(0.05)	(0.06)	(0.06)
Unemployment rate	-0.575***	-0.565***	-0.567***
	(0.18)	(0.18)	(0.19)
GDP contraction	0.374*	0.359	0.360
	(0.22)	(0.23)	(0.23)
Public debt	0.008	0.006	0.009
	(0.02)	(0.02)	(0.02)
Trade openness	0.004	0.002	0.010
	(0.01)	(0.01)	(0.01)
Social expenditure	0.287	0.305	0.330*
	(0.18)	(0.19)	(0.20)
Foreign population	-0.056	-0.07	-0.069
	(0.07)	(0.07)	(0.07)
Intercept	-3.897	-2.798	-4.636
	(5.26)	(5.55)	(5.63)
Election intercept variance	5.899***	6.366***	6.392***
	(1.54)	(1.65)	(1.66)
N individuals	44197	21626	16660.000
N elections	44	44	44
LogLikelihood	-7789	-5845	-5274
BIC	15728	11829.1	10684.5

Standard errors in parenthesis. Significance level * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$

4.2 Findings on aggregate issue constraint

Table 4 shows a set of FGLS, OLS Bootstrapped, and 2SLS models predicting the deviation of redistribution preferences as a function of the interaction between immigration levels and unemployment rate. For space reasons, the interactions with other macro-economic indicators will be shown in the Appendix. Consistently with expectations, the interaction between immigration levels and unemployment reduces the deviation of redistribution preferences, both among the poor and the rich. By contrast, that same interaction does not have significant effects on the deviation of immigration attitudes (not shown). When using the average position of redistribution and immigration preferences (rather than the deviation) as dependent variables, the interaction between immigration and unemployment pushes electorates to be more rightist in the redistribution dimension, but is inconsequential for the immigration dimension (see Appendix).

Table 5 shows a set of models predicting the random intercept of radical right voting per election. Consistently with expectations, a high deviation in redistribution preferences has a very strong and significant effect on populist success, especially among the rich. Contrary to this finding, however, populist parties seem to benefit from less deviation in immigration preferences. While a highly compact anti-immigrant electorate benefits populist anti-immigrant voting, a highly dispersed right-wing electorate in economic attitudes tends to weaken them. Figures 10a, 10b, and 10c illustrate the bivariate correlations between the average level of radical right voting[13] and the fragmentation of redistribution preferences in the electorate.

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[13]Estimated as the Empirical Bayes posterior prediction of a random intercept, after fitting a hierarchical logit model with voting radical right (vs. any other party) as the dependent variable.

Table 4: 2-step models predicting deviation of redistribution preferences

	Deviation among the rich			Deviation among the poor		
	FGLS	OLS Boots	2SLS	FGLS	OLS Boots	2SLS
Unemployment	0.038***	0.038***		0.022***	0.022**	
	(0.01)	(0.01)		(0.01)	(0.01)	
Foreign population	0.016***	0.016***		0.010***	0.010**	
	(0.00)	(0.01)		(0.00)	(0.00)	
Unemployment*foreign	-0.003***	-0.003***		-0.002***	-0.002***	
	(0.00)	(0.00)		(0.00)	(0.00)	
GDP contraction	0	0	0.001	-0.002	-0.002	-0.001
	(0.00)	(0.01)	(0.01)	(0.00)	(0.00)	(0.01)
Public debt	0	0	-0	0	0	0.000
	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)
Social expenditure	0.005	0.005	0.007	0.005*	0.005	0.005
	(0.00)	(0.01)	(0.01)	(0.00)	(0.00)	(0.00)
Trade openness	0.001***	0.001**	0.002**	0.001***	0.001**	0.001***
	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)
Deviation immigration attitudes rich	0.008	0.008	0.055			
	(0.02)	(0.02)	(0.05)			
Average redistribution position rich	0.975***	0.975***	0.758**			
	(0.15)	(0.21)	(0.35)			
Average immigration attitude rich	0.235	0.235	-0.092			
	(0.22)	(0.30)	(0.50)			
Deviation attitudes immigration poor				0.046***	0.046*	0.061**
				(0.02)	(0.02)	(0.03)
Average redistribution position poor				0.756***	0.756***	0.737***
				(0.15)	(0.22)	(0.21)
Average immigration attitude rich				-0.007	-0.007	-0.126
				(0.19)	(0.28)	(0.24)
Unemployment (instrumented)			0.051**			0.032***
			(0.02)			(0.01)
Foreign population (instrumented)			0.011			0.011**
			(0.01)			(0.00)
Unemployment*Foreign (instrumented)			-0.004**			-0.003***
			(0.00)			(0.00)
Intercept	0.119	0.119	0.051	0.144	0.144	0.082
	(0.17)	(0.25)	(0.32)	(0.15)	(0.21)	(0.18)
N elections	44	44	44	44	44	44.000
Log Likelihood	66	66		67	67	
BIC	-90.1	-90.1		-93.3	-93.3	

Standard errors in parenthesis. Significance level * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$

Figure 10: **Bivariate correlations between radical right voting and deviation of redistribution preferences**
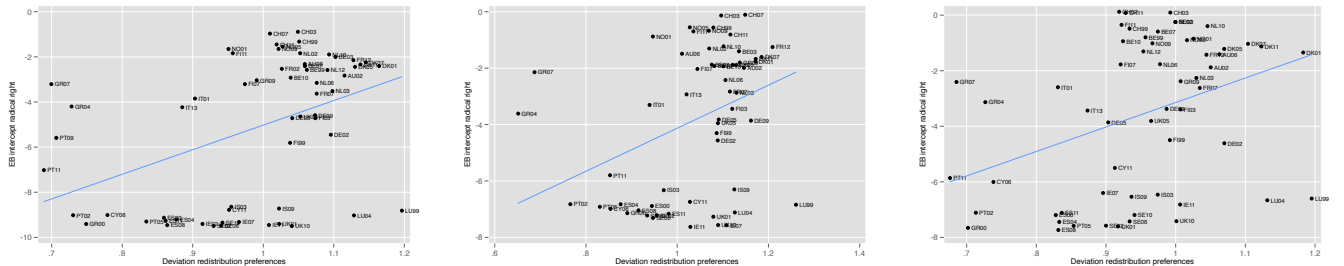
(a) All　　　　　　　　(b) Rich　　　　　　　　(c) Poor

Y axis: Empirical Bayes random intercept of a hierarchical logit model predicting radical right vote in the last election (vs. all other parties). X axis: deviation redistribution preferences.

Table 5: 2-step models predicting populist anti-immigrant voting

	Populist vs. right		Populist vs. left	
	FGLS	**OLS Boots**	**FGLS**	**OLS Boots**
Deviation redistribution rich	12.953***	12.953**		
	(3.70)	(5.15)		
Deviation immigration rich	-1.880***	-1.880***		
	(0.53)	(0.63)		
GDP contraction	0.234*	0.234	0.116	0.116
	(0.14)	(0.23)	(0.16)	(0.20)
Unemployment	-0.194**	-0.194	-0.08	-0.080
	(0.08)	(0.14)	(0.09)	(0.14)
Public debt	-0.007	-0.007	-0.022	-0.022
	(0.01)	(0.02)	(0.02)	(0.02)
Trade openness	-0.008	-0.008	0.002	0.002
	(0.01)	(0.01)	(0.01)	(0.01)
Foreign population	-0.001	-0.001	0.093*	0.093
	(0.04)	(0.05)	(0.05)	(0.07)
Social expenditure	0.185*	0.185	0.313***	0.313**
	(0.10)	(0.14)	(0.11)	(0.14)
Average redistribution rich	-2.795	-2.795		
	(5.22)	(7.43)		
Average immigration rich	13.638**	13.638		
	(6.69)	(9.33)		
Deviation redistribution poor			8.723*	8.723
			(4.60)	(5.96)
Deviation immigration poor			-2.504***	-2.504***
			(0.58)	(0.79)
Average redistribution poor			7.878	7.878
			(5.93)	(7.79)
Average immigration poor			22.313***	22.313**
			(6.86)	(9.05)
Intercept	-13.700***	-13.700**	-17.483***	-17.483***
	(5.08)	(6.28)	(5.22)	(5.88)
N elections	44	44	44	44.000
Log Likelihood	-84	-84	-90	-90
BIC	209.6	209.6	221.9	221.9

5   Conclusions

This paper speaks to the aggregate-level conditions favoring the emergence of populist radical right parties, and to the effects of the economy more specifically. Contrary to common wisdom expecting economic crises to fuel anti-immigrant populists, my analyses suggest that radical right presence is an inevitable consequence of good times. When things go well, distributional conflicts and out-group competition decrease, and more voters can afford to support economically generous policies. This increased level of ideological fragmentation increases the multidimensionality of the political space, allowing populist entrepreneurs to target non-represented constituencies. By contrast the interaction between bad economic performance and immigration levels links distributional conflicts with identity politics, turning the political space more unidimensional. It is precisely in unidimensional spaces where established mainstream parties have better chances to beat radical right candidates, since they can more easily target ideologically homogeneous constituencies.

The idea that bad macro-economic performance can shape the ideological constraint of mainstream electorates is intuitive if one thinks of recent and paradigmatic real-world cases. The relatively good macro-economic performance of the UK, for instance, with comparativey low levels of unemployment, is not at odds with an increasingly fragmented ideological space. The increasing division between liberal and conservative *tories*, for instance, is partially responsible for the internal conflicts of the British Conservative party and the exodus of part of the latter towards the populist UKIP over the last years. This situation has an interesting mirror image with the Spanish case, which has been quite paradigmatic over the last decade in terms of economic turmoil and surprising resilience to anti-immigrant parties. The comparatively lower ideological fragmentation of Spanish right-wing voters, who seem to be less able to afford dispersion towards more liberal tendencies, matches the notable electoral results of the mainstream-right PP.

These findings shed light on the disparity of results concerning the impact of the

macro-economy on radical right voting in previous literature. By focusing on the malleability of redistribution preferences and their alignment with immigration attitudes, I show the importance of mainstream right vs. radical right patterns of competition. This shows that the importance of economic axes of competition are important to understand radical right failure, and that the determinants of the dimensionality of the political space is an important avenue for future research. It is also true, however, that the effects of macro-economic conditions and immigration inflows might reveal a short-term malleability of the electoral space. Future research will have to elucidate whether the macro-economy can generate long-lived patterns of realignment (for instance via socialisation of new generations entering the electorate (Neundorf and Soroka, 2018), and investigate the triggers of long-term dynamics.

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6   Appendix

Vignette 1: Good performance:

According to recent independent studies, unemployment figures will continue to go down in the United States, and economic growth is projected to pick up even further in the next couple of years.

Vignette 2: Good performance and immigration:

According to recent independent studies, unemployment figures will continue to go down in the United States, and economic growth is projected to pick up even further in the next couple of years. Immigration levels are also expected to rise, so that one in three Americans will soon be an immigrant or have immigrant parents.

Vignette 3: Bad performance:

According to recent independent studies, economic expansion in the United States will be much lower than anticipated. Declining economic growth is expected to be associated with higher unemployment figures in the next couple of years.

Vignette 4: Bad performance and immigration:

According to recent independent studies, economic expansion in the United States will be much lower than anticipated. Declining economic growth is expected to be associated with higher unemployment figures in the next couple of years. Immigration levels are also expected to rise, so that one in three Americans will soon be an immigrant or have immigrant parents.