

Mechanisms of Political Polarization

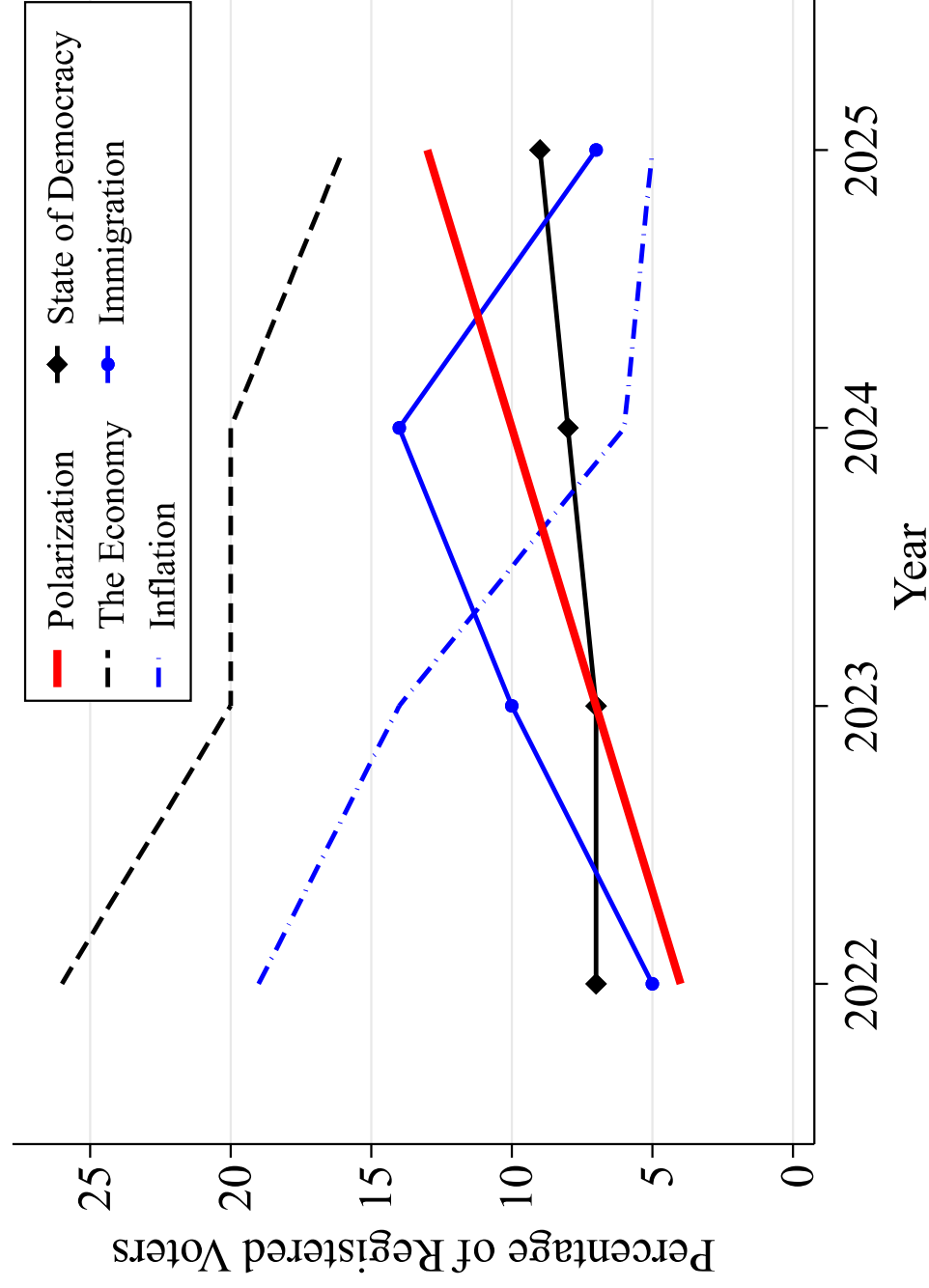
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Polarization has become a central problem

- ▶ Voters and politicians are sharply divided
 - ▶ Disagreement on facts, not just policies
 - ▶ Intolerance of opposite political views

Most Important Problem



Why so much polarization?

Two mechanisms

- ▶ **Demand side:** how voters form beliefs
 - ▶ Social context \Rightarrow beliefs
 - ▶ Conflict salience \Rightarrow extremism
 - ▶ Political propaganda \Rightarrow polarization ?
- ▶ **Supply side:** how politicians communicate
 - ▶ Propaganda: persuade swing voters or mobilize core voters?
 - ▶ Rhetoric becomes more polarized before the election
 - ▶ Opportunism, not ideology, polarizes politicians
- ▶ **Complementarities** between demand and supply
 - ▶ Social context \Rightarrow Voters receptive to polarizing propaganda
 - ▶ Divided voters \Rightarrow Political incentives to diverge and polarize

“Us vs Them”: Salient Conflict and Belief Polarization

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Why do voters disagree on facts?

- ▶ Economic research emphasizes [Levi and Razin 2019]:
 - ▶ Segregation, Echo chambers
 - ▶ Distortions in information processing
 - ▶ selective attention, correlation neglect, motivated beliefs
- ▶ This paper: *social identity*, not information processing
 - ▶ Polarization driven by conflict salience
 - ▶ No new information needed

Social Identity Theory

Large literature in social psychology, formalized in earlier work
[Bonomi, Gennaioli, Tabellini 2021, Gennaioli, Tabellini 2025]

- ▶ Individuals have multiple latent identities
 - ▶ social class, cultural progressive/conservative
- ▶ Identify with ingroup defined by *most salient* social conflict
- ▶ Slant beliefs towards those of ingroup *stereotype*
 - ▶ Polarization
 - ▶ Spillover effects across dimensions
 - ▶ Larger effects if greater ingroup-outgroup disagreement

The experiment

- ▶ Pre-registered online experiment, US Representative sample, N= 12,960, 3 waves in 2023-24
- ▶ **Beliefs** on 10 issues (5 economic, 5 cultural; facts and policy)

Survey Parts in Temporal Order				
	Enemy Choice	Outcomes	Enemy Choice	Add info including
Economic Treatment (ET)	Economic	Beliefs	Cultural	Partisan Identity
Cultural Treatment (CT)	Cultural	Beliefs	Economic	Partisan Identity
Control	Placebo	Beliefs	Cultural, Economic	Partisan Identity

Enemy choice

“Which group do you and people like you feel most threatened by?”

▶ Economic Treatment

- ▶ Billionaires evading taxes; Big business; Wall Street lobbyists $\Rightarrow E$
- ▶ Communists; Trade Unions; Lazy people on welfare $\Rightarrow -E$

▶ Cultural Treatment

- ▶ Evangelicals; NRA; White Pride supporters $\Rightarrow C$
- ▶ BLM; LGBTQ; Cancel culture activists $\Rightarrow -C$

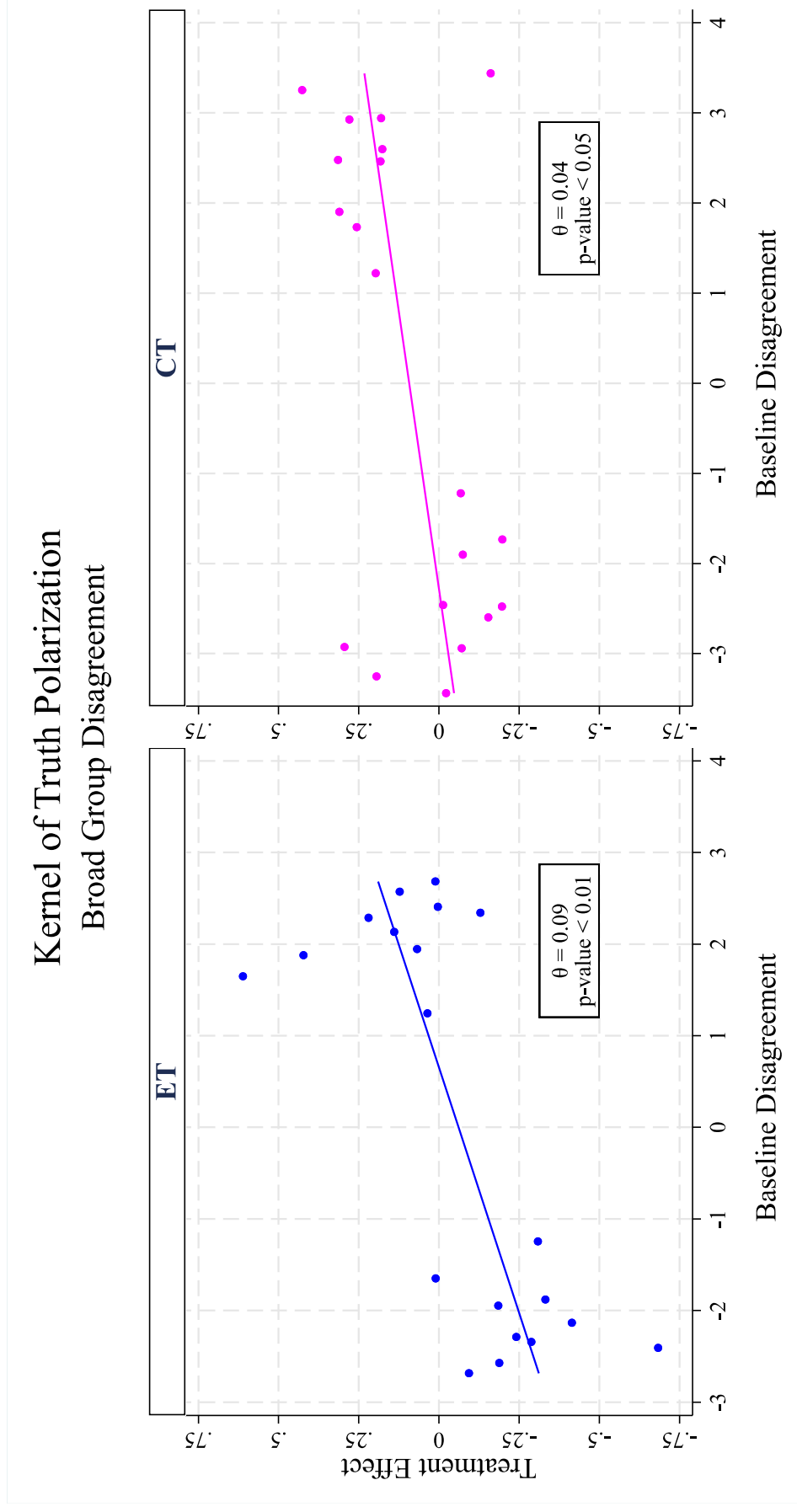
Prediction 1: Salience polarizes groups

Relative to Control:

- ▶ *ET* raises disagreement of opposite **economic** groups by 13-35%
- ▶ *CT* raises disagreement of opposite **cultural** groups by 1-24%
 - ▶ Effects also on *factual* beliefs (not just policy)
- ▶ Spillover effects across domains
- ▶ Not due to cueing political parties
 - ▶ Similar magnitudes if control for party affiliation interacted with treatments

Prediction 2: Stereotypes amplify true differences

- ▶ Stronger treatment effect if ingroup-outgroup baseline disagreement is larger



- ▶ Rules out alternatives based on anxiety, anger or noise

Implications for political realignment

- ▶ Identity switches explain political realignments
 - ▶ Cultural conflict becomes salient \Rightarrow Lower-class but cultural-conservative voters ($E, -C$) realign from Left to Right
 - ▶ D vs R in US
 - ▶ Le Pen in France (Didier Eribon, *Returning to Reims*)
- ▶ Higher salience of *external* conflict can reduce *internal* conflict
 - ▶ Social identity can also reduce political polarization

Demand side: takeaways

- ▶ “Us vs Them” logic fuels extremism
 - ▶ Cueing social enemies \Rightarrow belief polarization
 - ▶ Conflict realignment driven by changing issue salience
- ▶ Implications for political propaganda
 - ▶ Propaganda works by changing salience, not by providing information
 - ▶ Outgroup bashing mobilizes ingroup
 - ▶ But it must *resonate* with pre-existing cleavages
- ▶ Information-based interventions (fact-checking, media literacy) address a symptom, not the cause

Do Elections Moderate or Polarize Political Rhetoric?

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Two views of elections

1. Moderating effect
 - ▶ Converge towards Median or "Swing" voters
2. Polarizing effect
 - ▶ Diverge and polarize: target and mobilize core voters
[Gleaser et al. 2005, Gennaioli & Tabellini 2025]

Evidence so far is inconclusive

We study political leaders' communication on Twitter/X in a sample of countries

- ▶ Focus on competition between Populist vs Non-Populist politicians
- ▶ **Does their rhetoric become more or less polarized before elections?**

Data and methodology

- ▶ 3.4 million Tweets, 367 **political leaders**, 21 countries, 2013-2022
 - ▶ 15 EU plus Australia, Brazil, Mexico, Norway, UK, US
 - ▶ All PM/presidential candidates 2001-22, plus leaders of main parties
- ▶ Classify politicians as *P* / *NP* (ChatGPT)
- ▶ Estimate quarterly polarization ("*partisanship*")
 - ▶ Ease with which can infer politician's type, based on words used
 - ▶ Robust to finite sample bias and trends in verbosity (Gentzkow, Shapiro and Taddy 2019)
 - ▶ Average partisanship in Tweets of *P* vs *NP* much larger and more volatile than in US Congressional speeches
- ▶ Study patterns of polarization around elections
 - ▶ Exploit staggered elections across countries

Event study

- ▶ To isolate effect of elections from other shocks, and from changing composition of politicians, estimate:

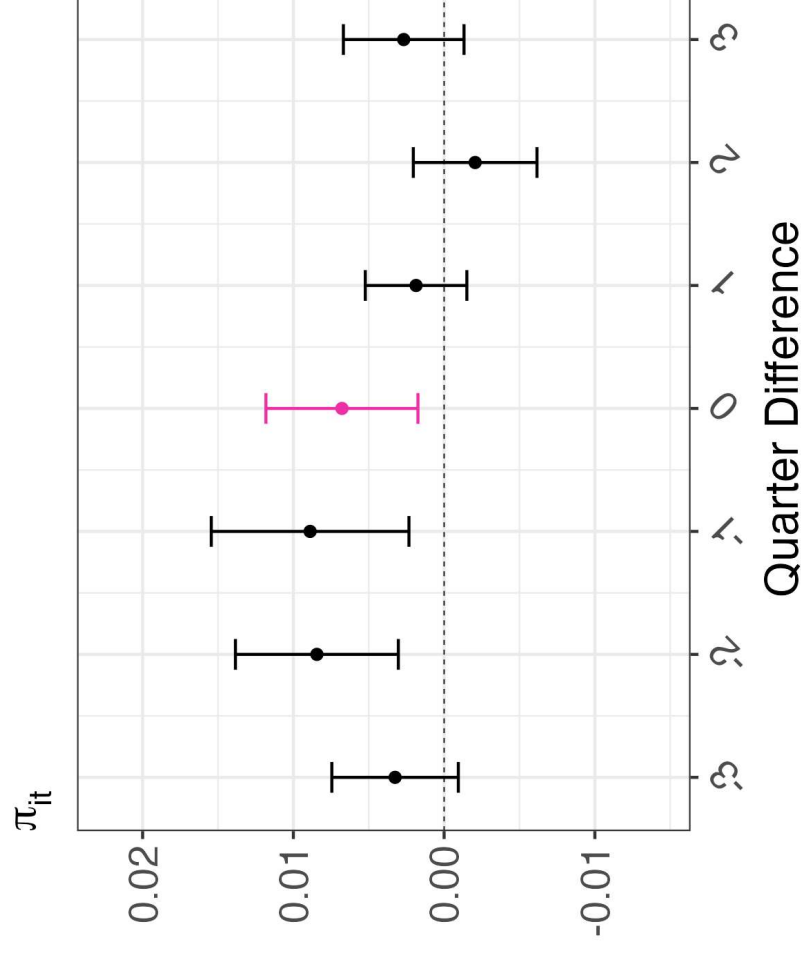
$$\pi_{it} = \sum_{d(i,t)=-3}^3 \beta_{d(i,t)} D_{d(i,t)} + \gamma_i + \delta_t + \tau_{el(i,t)} + \epsilon_{it},$$

where:

- ▶ π_{it} = partisanship
- ▶ $D_{d(i,t)} = 1$ if at Q distance $d(i, t)$ from election
- ▶ β measures effect of being at distance $d(i, t)$ from election, relative to other quarters, for the same i
- ▶ $\tau_{el(i,t)}$ are dummies for the closest elections for i at date t

Event study

- ▶ Polarizing effect of election quarter on $\pi_{it} \approx 10\%$ of SD of π_{it} over entire sample
- ▶ 2 years after elections, one tweet raises predictability by 6 pp. Effect is 70% larger during election quarters



Errors clustered at the country-elections level, 95% CI

Supply side: takeaways

- ▶ Elections have polarizing effect on political rhetoric
 - ▶ Between and within topics
 - ▶ *NP* topics (policy issues \neq immigration) become more distinctive of *NP* politicians
 - ▶ *P* topics become more distinctive of *P* politicians

Overall, suggestive that

- ▶ Opportunistic motives (not ideology) drives polarization
- ▶ *P* vs *NP* compete for different groups of voters, not same swing voters

Social media and political polarization

Two main results

1. Conflict salience fuels voters' extremism
 - ▶ Role for polarizing political propaganda
2. Tweets become more polarized before elections
 - ▶ Politicians seek to mobilize core voters, and make them more extreme

Social media diffusion \Rightarrow more political polarization? [Melikov 2025]

1. Conflict salience more easily evoked & diffused
 - ▶ Polarizing propaganda more effective
2. Propaganda more easily targeted to core voters
 - ▶ Politicians have stronger incentives to diverge and fuel extremism