

Backsliding by Surprise: The Rise of Chavismo

Dorothy Kronick^{*} Barry Plunkett[†] Pedro L. Rodriguez[‡]

December 2, 2022[§]

Abstract

How do elected autocrats come to power? Prominent explanations point to distributive conflict. We propose instead that some candidates advertise democratic deconsolidation as “deepening democracy,” which can have crosscutting appeal. We evaluate this proposal through the election of Venezuela’s Hugo Chávez, an emblematic elected autocrat. Using original data, we find that historical voting patterns and political rhetoric are consistent with our proposal: Chávez came to power with the cross-class support of voters from across the traditional political spectrum, and his campaign emphasized rather than obscured his plan to remake political institutions.

^{*}Corresponding author (kronick@berkeley.edu). Assistant Professor, Goldman School of Public Policy, University of California, Berkeley

[†]Skip Protocol

[‡]Visiting Scholar, Center for Data Science, New York University and International Faculty, Instituto de Estudios Superiores de Administración

[§]Competing interests: The authors declare none. We thank Richard Dinapoli and Nicolás Idrobo for excellent research assistance, and the Penn Program on Opinion Research and Election Studies for generous financial support. For comments, we thank Andrés Uribe, Javier Corrales, Thad Dunning, David Hausman, Marc Meredith, Francisco Monaldi, Francisco Rodríguez, Arturas Rozenas, Hillel Soifer, Dawn Teele, Francisco Toro, Adam Ziegfeld, and workshop participants at the University of Pennsylvania, the University of Chicago, Rice, Temple, Stanford, Davis, Harvard, and APSA.

How do elected autocrats come to power? Prominent explanations point to class conflict, arguing that poor voters prefer a powerful executive ally to democratic institutions that are captured by moneyed elites (e.g. Acemoglu et al., 2013b). These accounts cast the subversion of democracy as a means to an end, the unsavory but unavoidable vehicle by which voters pursue their redistributive preferences.

But many elected autocrats initially attempt to sell democratic deconsolidation as an end in and of itself, even portraying their proposals as vaguely *democratizing*. These candidates capitalize not on polarization (Svolik, 2020; Graham and Svolik, 2020), inequality (Acemoglu et al., 2013b), relief (Grillo and Prato, 2020), or even stealth (Chiopris et al., 2021; Luo and Przeworski, 2019) but rather on crosscutting frustration with the status quo: anti-system sentiment. Anti-system sentiment can stem from economic grievances that are weakly correlated with income or wealth, creating intra-class rather than inter-class cleavages. Proposals to shake up political institutions may then appeal to voters from across the socio-economic or ideological spectrum.

Turkey’s Recep Erdoğan, for example, did not rise to power by mobilizing poor victims of the previous years’ recession; rather, he exploited cross-cutting disillusionment with the status quo (Carkoglu, 2002, 37; Cagaptay, 2002, 2). Hungary’s Viktor Orban, likewise, made his name with a searing pro-democracy speech; he later became prime minister not by rallying the poor against the austerity of the previous government (Lomax, 1999, 120; Scheiring, 2020, 312), but by appealing to a cross-cutting coalition of voters seeking a “new beginning” (Szilágyi and Bozóki, 2015, 162). Orban then “morphed into an opponent of democracy” (Berman, 2021, 72), while Erdoğan earned the moniker “New Sultan” (Cagaptay, 2020).

Theories focused on inequality or polarization predict that elected autocrats come to power with the support of one side of the socio-economic or ideological spectrum (Acemoglu et al., 2013b; Karakas and Mitra, 2020; Graham and Svolik, 2020); we instead predict a fleeting realignment: that elected autocrats temporarily shift the dimension of political conflict, initially drawing voters from across traditional coalitions (as in Buisseret and Van Weelden, 2020; Greene, 2008; Schofield, 2003).

We evaluate these predictions using new data on the rise of Venezuela’s Hugo Chávez, an emblematic elected autocrat. This case is central to studies of “democratic subversion” (Levitsky and Ziblatt, 2018, Ch. 4), “illiberal democracy” (Mounk, 2018), and “democratic backsliding” (Bermeo, 2016), yet there is no consensus on the roots of Chávez’s initial electoral success. Some scholars emphasize class cleavages, while others point to cross-cutting anti-system sentiment; quantitative evidence has come largely from correlations among variables in a

handful of public opinion surveys.¹ Moreover, among scholars who focus on anti-system sentiment, there is no consensus about what (if not class) divided the most anti-system voters from everyone else.

We suggest that Venezuela’s long pre-Chávez recession produced uneven harm *within* class groups, sparking anti-system sentiment among those who fared poorly relative to their socioeconomic peers. We then document three findings consistent with the notion that Chávez came to power not by rallying the poor or the left against their democratic principles, but rather by selling himself as a candidate who would deepen Venezuelan democracy—thus appealing to anti-system voters from across classes and across the traditional political spectrum.

First, we find that Chávez’s initial coalition was *fleeting*. Using an original data set of historical election returns, we show that the bloc that elected Chávez in 1998 quickly splintered. We interpret this fact as evidence of a temporary electoral realignment, after which many Venezuelan voters became “repented Chavistas” (Corrales and Penfold, 2015, 44).²

Second, we find that voting in the 1998 presidential election—which brought Chávez to power—was *less* tied to socio-economic status than voting in any other presidential election, 1958–2012. It was not “the poor” or “the left” who elected Chávez in pursuit of specific tax policies; rather, Chávez initially drew voters from across socio-economic and ideological lines.

Third, we provide additional evidence that Chávez openly campaigned on a proposal for sweeping institutional change (Handlin, 2017; Hawkins, 2010). But far from promising to undermine checks and balances or otherwise promote majoritarian institutions, Chávez vowed to curb Venezuela’s “imperial presidency,” push for decentralization, and even establish a prime minister and a fourth branch of government (Section 2.3). The resultant ambiguity allowed many voters to hear what they wanted to hear. We arrive at these findings by drawing quantitative and qualitative comparisons between Chávez’s campaign-trail rhetoric and that of his principal opponent, Henrique Salas Römer.

¹For example, Ellner (2003, 19) and Dunning (2008, 173) emphasize class cleavages; Handlin (2017), Weyland (2003, 836), McCoy (1999, 66), and Corrales (2005, 106), among others cited below, emphasize anti-system sentiment. Seawright (2012, 134) and Roberts (2003, 66–67) both use intra-survey correlations to argue, respectively, *against* and *in favor of* class-based voting in the 1998 election. Lupu (2010) finds a *stronger* correlation between socio-economic status and vote choice in 1998 than in later elections; Handlin (2013), critiquing Lupu’s measure, finds the opposite.

²Chiopris et al. (2021) also highlight the role of uncertainty, but their model (like that of Graham and Svobik, 2020, among others) predicts that polarization enables elected autocrats, who come to power with the support of one side of the ideological spectrum. We instead focus on realignment.

Beyond work on democratic backsliding, these findings contribute to the literature on populism. Two distinct views of populism both claim Hugo Chávez as standard bearer: (1) macroeconomic populism (Acemoglu et al., 2013a), in which “anti-establishment” means “anti-economic-elite” and entails a specific set of redistributive policies that appeal to poor voters, and (2) populism in the sense of Barr (2009), in which “anti-establishment” means “anti-political-establishment” and entails a proposal to change political institutions—a proposal that may hold cross-cutting appeal. The former requires a coalition of the dispossessed, the latter a coalition of the disappointed. We make two contributions. First, in Section 1, we describe conditions under which we would expect anti-system sentiment to span the socio-economic spectrum (and, thereby, conditions under which we would expect cross-cutting support for proposals to reshape political institutions). Second, in Section 2, our empirical analysis reveals that Chávez in 1998 was very much a Barr-type populist—not yet a macroeconomic populist—even shifting political competition from a left–right dimension to a change–status-quo dimension (Handlin, 2017, 17, 43). By proposing an ambiguous “new democracy” to a diverse set of voters disgusted with the status quo (Hawkins, 2010), Chávez assembled a heterogeneous anti-system coalition. When his new democracy proved not-so-democratic after all, the coalition splintered. In our account, cross-cutting anti-system sentiment—more than class conflict—brought Chávez to power, and merits renewed consideration in the analysis of other cases.

1 Theory: Elected Autocrats as Riker’s Heres- thetic Leaders

Prominent explanations for the rise of elected strongmen focus on distributive conflict and ideological polarization. Acemoglu et al. (2013b), for example, propose that checks and balances allow the elite to capture policymaking; for the poor majority, when inequality is high, the cost of elite capture outweighs the benefits of checks and balances.³ Other accounts point to polarization (e.g. Haggard and Kaufman, 2021). In Svoboda (2020), for example, polarization threatens democracy because voters far enough to the left will vote for the left candidate no matter what—even if the voter values democracy and the candidate subverts it.

What these theories have in common is that candidates who subvert democracy draw electoral support from one side of the socio-economic or ideological spectrum. We instead follow Handlin (2017, 43) in describing two dimensions of political conflict in Venezuela: an economic dimension (left–right) and an institutional-

³Similarly, the threat of elite capture fosters macroeconomic populism in Acemoglu et al. (2013a).

change dimension (change–stability).⁴ We propose that Chávez won election in 1998 not primarily by leveraging left–right polarization or poor–elite distributive conflict, but rather by exploiting a cross-cutting cleavage that divided the most virulently anti-system voters from everyone else. Chávez came to power by shifting political conflict onto the change–stability dimension, thus “structuring the world so [he] could win” (Riker, 1986, ix).

This is not to say that anti-system sentiment in Venezuela was divorced from preferences over economic policy—only that those preferences may have been weakly correlated with income or ideology. Like many scholars before us, we view anti-system sentiment as the consequence (at least in part) of a prolonged recession (e.g. McCoy and Myers, 2004; Morgan, 2011). But while much of the literature considers how recession fuels class conflict—Dunning (2008), for example, shows that low oil prices exacerbate poor–elite conflict and thereby spark attacks on democracy—we suggest that recession also provokes *intra-class* conflict. In Venezuela, the recession sharpened intra-elite and even intra-sector business rivalries, leading the losers of the most recent round of crony-capitalist battles to support Chávez’s candidacy (Gates, 2010; Santodomingo, 1999; Tornell, 1998, formalizes this dynamic). It also widened the longstanding system-sentiment gap between the urban and rural poor. The rural poor voted for Venezuela’s traditional parties, whereas the urban poor were long neglected and alienated (Myers, 1975; Canache, 2002b; Ellner, 2003; Velasco, 2015).

These precise mechanisms may be specific to Venezuela, but the logic is general: adverse economic conditions can spawn a set of material grievances whose severity is weakly correlated with income or with preferences over redistribution (or, more generally, with preferences over any single economic policy issue). While a vote for macro-economic populism may be an expression of a preference for specific new institutions that change tax policy in known ways (Acemoglu et al., 2013a,b), we see a vote for anti-system populism as the expression of a hope that unspecified (or underspecified) new institutions will produce economic outcomes unlike those of the status quo. Such hopes proliferate with recession but are not always predicted by income.⁵ The implication is that, while macro-economic populist coalitions may be defined by income, anti-system populist coalitions unite disparate groups each with their own reasons for a “palpable sense of general unhappiness

⁴“Stability” here is a relative term; even Chávez’s opponent proposed some degree of institutional reform. But he mocked Chávez’s call to rewrite the constitution.

⁵This may help explain why, for example, Donald Trump and Bernie Sanders earned some of their highest vote shares in the same counties, or why the recent wave of anti-system populist sentiment seems at once obviously tied to the Great Recession and yet disconnected from simple survey measures such as *I lost my manufacturing job* (Gurieva, 2018; Sides et al., 2019; Berman, 2021; Mutz, 2021).

with the status quo” (Ward et al., 2021, 370). In addition to Handlin (2017), this account builds on Buisseret and Van Weelden (2020) and Greene (2008), who emphasize that outsider candidates can win by activating a second issue dimension, as well as Greene and Robertson (2020), who highlight the role of *sentiment* in generating support for authoritarian leaders.⁶ Schofield (2003) clarifies how shifts in the dimension of political conflict can occur in equilibrium, developing a model of spatial competition in two dimensions with “activist valence:” valence that is endogenously determined by contributions from individuals. In pursuit of help from disaffected activists who care passionately about the latent dimension of conflict but little about the active one, vote-maximizing candidates shift dimensions, producing electoral realignment (see Miller and Schofield, 2003).⁷

When anti-system sentiment is widespread, candidates may profitably campaign on promises of institutional change (Barr, 2009). Whether that change will deepen or dismantle democracy is often ambiguous ex-ante, in part because the outcome likely depends not only on candidate characteristics (Levitsky and Ziblatt, 2018) but also on hard-to-predict circumstances (Corrales, 2018).⁸ It is this ambiguity that allows for backsliding by surprise.

2 Backsliding by Surprise in Venezuela

We investigate three empirical implications of this proposal.

First, we find that the 1998 election induced a fleeting *electoral realignment*: a change in which people vote together. Realignment is an empirical implication of the idea of a shift in the dimension of conflict (Miller and Schofield, 2003). The temporary nature of the realignment is an empirical implication of the idea that Chávez’s initial coalition endorsed a vague *change* platform, not the specific slate of institutions created during his first years in office.

⁶Buisseret and Van Weelden (2020) propose that outsiders compete as third-party candidates—rather than crashing established-party primaries—when intra-party polarization is *low*. This logic is consistent with our case: left-right polarization between the two main parties was low, and Chávez competed under his own party label. However, the model does not entirely apply to Venezuela because (a) only one of the two major parties held a primary and (b) that primary was also won by an outsider, who later dropped out of the race. Greene (2008) shows that Mexico’s PAN defeated the PRI by mobilizing pro-democracy voters.

⁷This is an apt description of the Venezuelan case. Veterans of longstanding institutional reform efforts initially supported Chávez *despite* not hailing from the left, and, in some cases, despite active ideological misgivings. These activists made significant contributions to Chávez’s campaign and credibility.

⁸It is beyond our scope here to fully specify the conditions under which institutional change takes one direction or the other, nor could we test any such predictions by studying one case. What is essential to our argument is that both outcomes are often plausible ex-ante.

Second, using survey and administrative data, we find that voting in the 1998 and 2000 elections was *less* tied to socio-economic status than vote choice in other elections, 1958–2012. This result is difficult to reconcile with the idea of 1998 as an election that *sharpened* class cleavages in voting, but it resonates with our proposal that the left–right dimension of conflict was salient in all elections except 1998 and 2000, which were contested on the cross-cutting change–stability dimension.

Third, using text analysis, we find that, in 1998, Chávez campaigned on a platform of (vaguely defined) institutional change. This finding, too, is consistent with the notion that the change–stability dimension was salient in 1998.

2.1 The 1998 coalition was *fleeting*.

The election of Chávez in 1998 induced a fleeting *electoral realignment*. The voters who elected Chávez in 1998, we find, often opposed each other in previous elections—and they opposed each other in subsequent elections, too. Chávez’s initial coalition coalesced briefly and then dissolved.

This fact is consistent with the notion of a shift in the dimension of political conflict (Miller and Schofield, 2003), and with the idea that many of Chávez’s initial supporters experienced remorse (Corrales and Penfold, 2015, 44). But it is difficult to reconcile with the image of far-sighted voters correctly anticipating the content and consequences of Chávez’s new political institutions (Acemoglu et al., 2013b).

We observe this fleeting realignment in an original data set of district-level election returns. Beginning with the 1998 elections, these data are publicly available online; for 1958–1993, we digitized returns printed in volumes published by Venezuela’s *Consejo Supremo Electoral* (CSE). Overall, our data include vote shares for 287 districts over twelve presidential elections.⁹

In the absence of electoral realignment, we would expect Venezuela’s electoral geography to remain stable. The districts most in favor of Acción Democrática (AD)—one of two parties that dominated presidential elections from the 1960s through the 1980s—would remain the most pro-AD districts from one election to

⁹These geographic units correspond to Venezuelan municipalities *as they existed in 1993*. We choose the 1993 municipality as a unit of analysis for both practical and conceptual reasons, as recommended by Soifer (2019, 105–106). Practically, the 1993 municipality is the smallest jurisdiction for which we can construct geographic units that are stable over time. Conceptually, the municipality is a political jurisdiction governed by a mayor; in that sense, it is a unit “at which actors form their perceptions of relevant aspects” of politics (105). In any case, repeating our analysis at the state level reveals a similar pattern (Figure E.4).

the next; likewise, the least-AD districts would remain anti-AD. Realignment, in contrast, shows up as a scrambling of the electoral map: the most-AD districts might suddenly vote for the same candidate as the least-AD districts. Realignment produces coalitions of strange bedfellows (e.g. Sundquist, 2011; Miller and Schofield, 2003, Table 2).

We measure the (in)stability of Venezuelan electoral geography using the correlation between district-level vote shares in one election and district-level vote shares in subsequent elections (following Miller and Schofield, 2003, and Eubank, 2012, for the United States).¹⁰ High inter-election correlations suggest stability. Low inter-election correlations reveal realignment: a mixed-up electoral map.

We find that Venezuela’s electoral geography remained remarkably stable for 35 years, abruptly changed with the election of Hugo Chávez in 1998, and then abruptly changed back by the time of his re-election in 2006. To see this, consider Figure 1. The first point in this figure—the one corresponding to 1963—marks the correlation between AD’s vote share in the 1963 presidential election and AD’s vote share in the 1958 presidential election (the first election after Venezuela’s transition to democracy).¹¹ Unsurprisingly, this correlation was high: 0.86. Over the five years between 1958 and 1963, Adeco districts (i.e., pro-AD districts) stayed Adeco. The other points in Figure 1 mark the correlation between AD vote share in subsequent elections (1968, 1973 ... 1993) and AD vote share in 1958. Naturally, the correlation weakened somewhat as time progressed. But it remained high: in 1993, the correlation with AD’s 1958 vote share was 0.54. (We present all corresponding scatter plots in Appendix Figure E.4.)

That changed in 1998. The old AD coalition split; some Adeco districts voted for Chávez, others against. The correlation between the vote share of AD’s candidate in 1958 and AD’s candidate in 1998—Chávez’s opponent—was almost exactly zero ($\hat{\rho} = 0.01$). So was the correlation between *Chávez’s* vote share in 1998 and AD’s vote share in 1958, which we plot in Figure 1 ($\hat{\rho} = -0.02$). After decades of stability, the 1998 election scrambled Venezuela’s electoral map.¹²

We also observe this pattern in survey data. In Appendix Table ??, we show that

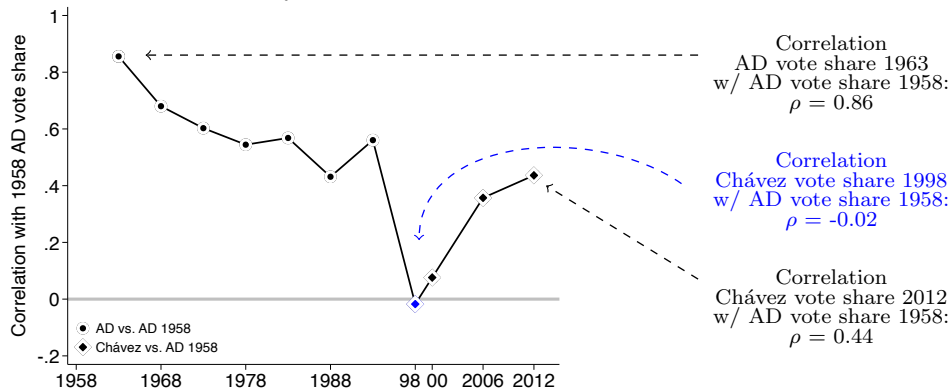
¹⁰The relationship between district-level vote shares in one election and district-level vote shares in subsequent elections is approximately linear, as we show in Appendix Figure E.4.

¹¹We use “AD’s vote share” as shorthand for “the vote share of AD’s presidential candidate.” Venezuela allowed voters to cast ballots for the same candidate under different party endorsements.

¹²Appendix Figure D.2 presents alternate versions of Figure 1 that use 2012 or 1998 as the base year for bivariate correlations (rather than 1958). The takeaways are similar: Chávez’s 2012 vote share is more correlated with historical AD votes than with Chávez’s own 1998 vote share; moreover, inter-election correlations under Chávez weakened much more in the 14 years between 1998 and 2012 than AD’s did in the 35 years between 1958 and 1993.

Figure 1: Chávez’s Election Temporarily Scrambled Venezuela’s Electoral Map

Using an original panel data set of municipal election returns, this figure plots the bivariate correlation (across municipalities) between (i) AD’s vote share in 1958 and (ii) AD’s or Chávez’s vote share in each year indicated on the x -axis.



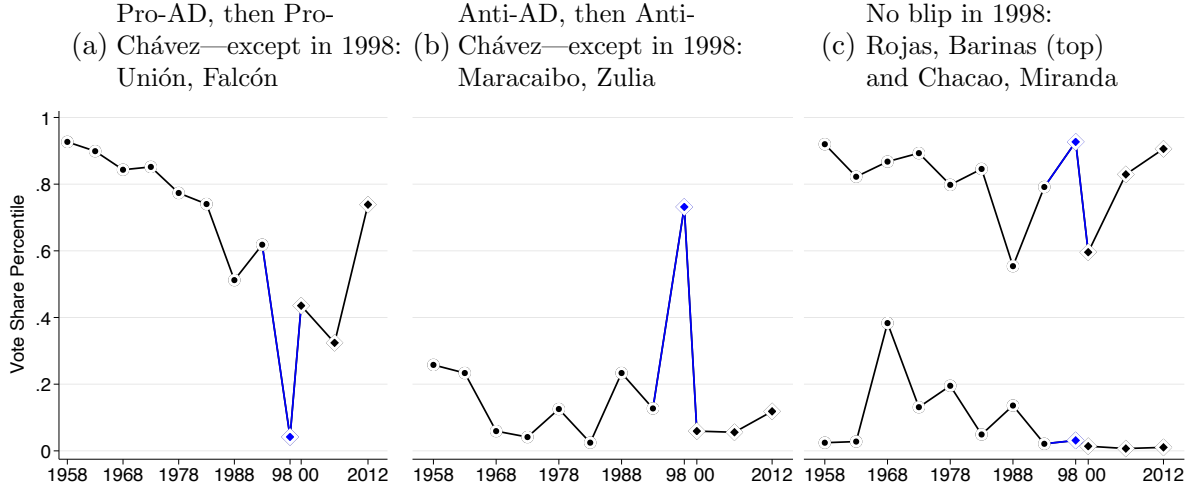
former Adecos (supporters of AD) and former Copeyanos (supporters of AD’s principal opponent, COPEI) were equally likely to support Chávez in 1998. If we assume that former Adecos and former Copeyanos generally supported opposing candidates in previous elections—at least, during the heyday of AD–Copei hegemony in the 1970s and 1980s—then this pattern indicates electoral realignment.

Remarkably, Venezuela’s traditional geographic voting blocs reemerged in 2006 and 2012, when Chávez was twice reelected. Indeed, by 2006, Chávez had largely captured former AD municipalities. The correlations between (a) the vote share of AD’s candidate in 1958 and (b) Hugo Chávez’s vote share in 2006 and 2012 were 0.34 and 0.44, respectively (Figure 1). Districts sorted back into the voting blocs of the 1960s, 1970s, and 1980s. The old Adeco coalition re-formed—as Chavismo.

Consider, for example, the district of Unión, in the foothills of the sierra of Falcón state, an eight-hour drive northwest of Caracas. Unión is rural and agricultural; the capital has fewer than 10,000 residents. For decades, Unión was AD country: in 1958, AD won 82% of the vote in Unión, putting Unión in the 92nd percentile of AD vote share across all districts; in 1993, Unión still ranked in the top 40% most-Adeco districts (Figure 2a). And eventually, by 2012, Unión became Chavista, ranking in the 73rd percentile of Chávez vote share. But in 1998, Unión was one of the least-Chavista districts in the whole country, in the 4th percentile of district-level Chávez vote share. The urban district of Maracaibo, Zulia—part of one of Venezuela’s biggest cities—followed the opposite trajectory: it was anti-AD for decades and later became anti-Chávez, but strongly endorsed Chávez in 1998, with a Chávez vote share in the 72nd percentile nationwide (Figure 2b). Yet other districts remained anti-AD/anti-Chávez or pro-AD/pro-Chávez throughout, with no blip in 1998 (e.g., Chacao and Rojas, respectively, Figure 2c). Thus in every

Figure 2: Four Examples to Illustrate the Dynamic of Fleeting Realignment

The evolution of vote share in these four municipalities illustrates the dynamic driving the temporary-realignment result in Figure 1. Each line plots one municipality's percentile in the distribution of AD vote share (through 1993, marked with circles) and then of Chávez vote share (from 1998, marked with diamonds). (a) Unión was pro-AD from 1958–1993 and later became Chavista—but ranked among the least-Chavista municipalities in 1998. (b) Maracaibo was anti-AD from 1958–1993 and later became anti-Chávez—but not in 1998. (c) Yet other municipalities voted as expected in 1998.



election except 1998, Unión voted with Rojas and Maracaibo with Chacao; in 1998, in contrast, Unión voted with Chacao and Rojas with Maracaibo. These examples illustrate the dynamic behind the temporary scrambling of Venezuela's electoral map.

We interpret this result as evidence that the 1998 election induced a fleeting electoral realignment, the result of a momentary shift in the dimension of political conflict. Rather than capture one or another traditional voting bloc, Chávez won with the support of voters from across the traditional political spectrum. But this strange-bedfellows coalition quickly splintered. This fact is difficult to reconcile with the idea that voters correctly anticipated the content of Chávez's early power grabs, deemed those power grabs in their own material interest, elected Chávez accordingly, and were satisfied with the consequences. Rather, our finding of a fleeting electoral realignment is consistent with the idea that people did not get what they voted for.

2.2 Voting in 1998 was *less* tied to socio-economic status than voting in other elections.

These results suggest the presence of (roughly) two winning coalitions in Venezuela: the old Adeco (pro-AD) coalition that later reelected Chávez, and the coalition that brought Chávez to power in 1998. We now characterize these two coalitions. To use a reductive but perhaps useful shorthand, the first coalition—the old Adeco coalition that later became Chavismo—united poorer, less-educated, and rural voters against wealthier, more-educated, more-urban opponents (for additional evidence of strong socio-economic differences in AD support, see Baloyra and Martz, 1979, 75).¹³ The latter—Chávez’s 1998 coalition—united a heterogeneous group of anti-system voters: “alienated but educated” citydwellers (as Myers, 1975, characterized Venezuela’s anti-system vote in the 1970s), scattered rural elites (Gates, 2010), business rivals of Chávez’s opponent in the 1998 election (Santodomingo, 1999; Gates, 2010), a faction of the traditional elite left (such as the *Movimiento al Socialismo*; see also Morgan, 2011), and also the urban poor (Canache, 2002b). This potpourri was *more* socioeconomically diverse than the old AD coalition (cf. Ellner, 2003, 19). Far from an unprecedented bloc of poor and left-wing voters, Chávez’s initial coalition picked up a diverse anti-system current in Venezuelan politics. Across districts, his vote share was correlated with that of past anti-system candidates on the left *and* on the right (Appendix C).

This characterization resonates with the work of scholars who emphasize that Chávez’s initial supporters “hailed from all walks of life” (Weyland, 2003, 836) and that his 1998 coalition “united different classes” (Corrales, 2005, 106). Handlin (2017) argues that, in 1998, voters’ enthusiasm for *institutional change* spanned social classes and cut across the left-right dimension of conflict. Our findings support these accounts, contradicting work that instead highlights a sharp class cleavage in early voting for Chávez and his referenda (e.g. Acemoglu et al., 2013b; Ellner, 2003; Buxton, 2003, 123). Our findings are consistent with the idea of a shift in the dimension of conflict, of the type described by Schofield (2003) and Miller and Schofield (2003).

We provide new empirical evidence. Previous work has relied largely on qualitative data and on analysis of a handful of surveys taken immediately before the 1998 election. These intra-survey correlations are informative, but different scholars have used the same data to draw conflicting conclusions about the relative importance of socio-economic status in explaining vote choice in 1998 (e.g. Seawright, 2012, 134, and Roberts, 2003, 66–67). We instead use two new sources of

¹³See Appendix Figure D.3 for correlations between vote shares and population density; denser municipalities were more anti-AD and more anti-Chávez in every election except 1998 and 2000.

data: a collection of historical public opinion surveys, and, beginning in 1998, a voting-booth-level correlate of socio-economic status. These data allow us to evaluate whether voting was *more* or *less* tied to socio-economic status in 1998 than in other presidential elections. Our findings indicate that, far from sharpening class cleavages in voting, the 1998 election dulled them.

First, using the public opinion surveys, we consider the relationship between educational attainment and (self-reported) vote choice in each election.¹⁴ Education is often used to study the class bases of political parties in Latin America (Canton and Jorrat, 2002; Lupu and Stokes, 2009), and Handlin (2013) makes a strong case for it in Venezuela in particular. An index of education and wealth might better capture socio-economic status (Handlin, 2013), but we cannot consistently measure wealth across these surveys.¹⁵

For each election 1958–1993, we estimate the difference between (i) AD vote share among those with at least college education (high school in years ≤ 1973) and (ii) AD vote share among those with less than primary education. For the years 1998–2012, we estimate an analogous difference for Chávez’s vote share:

$$\hat{\theta}_t = \begin{cases} \frac{1}{n} \sum_i [(\text{VoteAD}_{it} | \text{College}_{it}) - (\text{VoteAD}_{it} | < \text{Primary}_{it})] & \text{for 1958–1993} \\ \frac{1}{n} \sum_i [(\text{VoteChávez}_{it} | \text{College}_{it}) - (\text{VoteChávez}_{it} | < \text{Primary}_{it})] & \text{for 1998–2012} \end{cases} \quad (1)$$

where VoteAD_{it} , VoteChávez_{it} , College_{it} , and $< \text{Primary}_{it}$ are indicators for each voter’s (self-reported) vote choice and educational attainment.

We find a steep education–voting gradient in every presidential election *except* 1998 and 2000. Between 1958 and 1993, college-educated voters were much less likely to vote AD than voters who did not finish primary school (Figure 3); similarly, in 2006 and 2012, college-educated voters were much less likely to vote Chávez than those who did not finish primary school. These differences are intuitive: both AD and Chávez sat to the left of their main rivals on the ideological spectrum (Baloyra and Martz 1979, 119; Lupu 2016, 103). But in 1998 and 2000, the education–voting gradient flattened. In those elections, the most- and least-educated voters were equally likely to vote for Chávez.¹⁶

Relative to other survey-based evidence, ours has the advantage of drawing comparisons across many elections. But our analysis does not escape known prob-

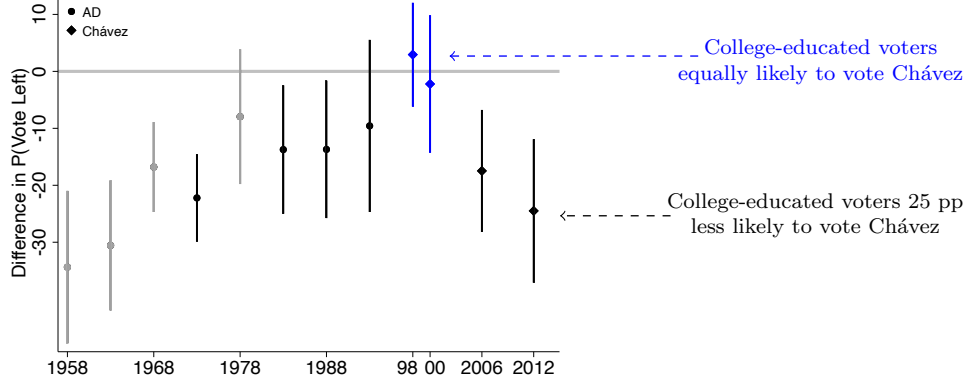
¹⁴The question is: “If the elections were this Sunday, for whom would you vote?”

¹⁵See Appendix B for details on the public opinion surveys.

¹⁶This is precisely the opposite of the finding reported in Lupu (2010)’s influential article on voting in the 1993–2006 elections, “Who Votes for Chavismo?” Lupu finds a *stronger* SES–voting gradient in 1998 than in 2000 or 2006; we find a weaker gradient. The contrast stems from different measures of SES: Lupu uses income, unadjusted for household size; we use education. Handlin (2013) discusses Lupu’s measure in detail.

Figure 3: Voting Tied to Education in Every Year Except 1998 and 2000

Points mark estimates from Eq. 1: the difference between (i) AD vote share among college graduates (high school in years ≤ 1973)[†] and (ii) AD vote share among those without primary education, for years 1958–1993; for 1998–2012, analogous quantities for Chávez’s vote share.



[†] We pool high school and college education in years ≤ 1973 because there are too few college-educated respondents.

Sources for Figure (a): 1973 survey from Baloyra and Martz (1973); 1983 survey from Baloyra and Torres (1983); 1988 survey from Baloyra and Torres (1983); 1993–2006 surveys from Lupu (2010); 2012 from LAPOP (2012). Greyed-out points rely on retrospective reports from later surveys rather than contemporaneous responses; readers may therefore take them with a grain of salt.

lems of using survey self-reports to study correlates of voting behavior. For one thing, stated vote intentions may differ from actual votes cast, and this intention–behavior gap may covary with education. For another, educational attainment—the only aspect of socio-economic status that is consistently measured across all of the surveys in our data—captures only one part of what we seek to estimate.

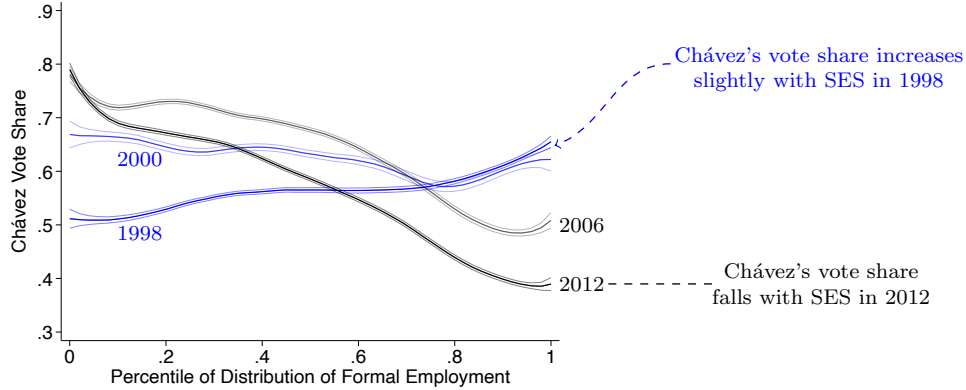
For these reasons, we also use administrative data to study the relationship between vote choice and socio-economic status, finding a similar pattern. In particular, for 1998 and subsequent elections, we pair electoral returns at the voting booth level with a voting-booth-level, election-specific measure of formal-sector employment.¹⁷ We construct this measure using data that other researchers scraped from the website of Venezuela’s social security institute. These data, which Hsieh et al. (2011) and Guerra Guevara (2019) generously shared with us, indicate which individuals held formal-sector employment in which years. Using national ID numbers (*cédula*), we merge this person-specific formal-employment indicator to the voter registry, allowing us to estimate *the proportion of registered voters in each booth who held formal-sector employment in the two years prior to each election*, or *percent formal*.¹⁸ This proportion, which varies across voting booths from zero to 40%

¹⁷There are approximately 23,000 voting booths per election, on average, each with an average of 590 registered voters. To the best of our knowledge, booth-level electoral returns and/or the voter registry are not available for elections prior to 1998.

¹⁸Using a longer or shorter window does not affect the results.

Figure 4: Voting–SES Gradient Reverses after 1998

This graph uses voting-booth-level data ($N=10K-30K$) to plot the relationship between Chávez’s vote share (y -axis) and a measure of socio-economic status (increasing along the x -axis), specifically, each voting booth’s percentile in the distribution of the fraction of voters with formal-sector employment. Consistent with Figure 3, Chávez’s vote share actually increased slightly with SES in 1998, turned negative in 2000, and then became more negative in 2006 and 2012.



Individual-level data on formal-sector employment were scraped from the Venezuelan Social Security Institute (IVSS) and shared with us by Hsieh et al. (2011) and Guerra Guevara (2019). Individual-level voter registration and voting-booth-level electoral returns published by the Venezuelan electoral council.

(see Appendix Figure D.3), captures a meaningful component of socio-economic status in Venezuela: Ellner (2012), for example, describes informal-sector workers as *marginalized* or *semi-marginalized* (108).

Because the distribution of *percent of voters with formal-sector employment* is skewed, and because the maximum changes over time (see Appendix Figure D.3), Figure 4 plots Chávez’s vote share against each voting booth’s *percentile* in the election-specific distribution of *percent formal* (such that observations are distributed uniformly along the x -axis by construction). The results echo those of the survey analysis in Figure 3. In 1998, Chávez’s vote share actually increased slightly with the proportion of voters with formal-sector employment; by 2006, in stark contrast, voting booths with the highest proportions of formal-sector voters supported Chávez at rates 30 percentage points lower than those of voting booths with the lowest *percent formal*. By 2012, the difference had widened to 40 percentage points.

This finding, which emerges both from survey data and from administrative data, is hard to reconcile with the hypothesis that the 1998 election *sharpened* class cleavages in voting, or with the notion that Chávez won in 1998 primarily by mobilizing lower-class voters (though it is consistent with Ellner’s view that “following his original electoral triumph Chávez relied *increasingly* on the support of the marginalized sectors,” 2003, 20, emphasis added; see also Dunning, 2008,

174). Instead, our findings support the idea that Chávez’s initial coalition drew voters from across the socio-economic spectrum and from across traditional political divides.

2.3 Chávez campaigned on institutional change.

In Svolik (2020), incumbents get away with subverting democracy by exploiting left-right polarization. Voters don’t value autocratic maneuvers for their own sake; rather, they accept packing the electoral council (for example) as the price they pay for an executive with favorable distributional policies.

This implies a prediction for campaign rhetoric: candidates should flaunt their economic policies and hide their plans to rewrite the rules. In Chiopris et al. (2021) and Luo and Przeworski (2019), elected autocrats rely on stealth: voters don’t hear about institutional change one way or the other. In contrast, our proposal of a shift in the dimension of political conflict implies active campaigning on *institutional change* (Schofield, 2003; Miller and Schofield, 2003).

Anecdotal examples of such campaigning are abundant. Chávez named his political party the Fifth Republic Movement, an expression of his intent to re-found the nation.¹⁹ On the campaign trail, he referred to the Venezuelan political system as a “moribund democracy” and proposed a constituent assembly (Chávez Frías, July 30, 1998). He slammed his political opponents for trying to “put makeup on rot,” declaring himself the only candidate who would take the necessary step of “eradicating the rot,” even comparing himself to a doctor excising cancer from the body politic (ibid). Handlin (2017), based on interviews and press accounts, concludes that Chávez attempted to “reframe the presidential contest itself as a referendum on [rewriting the constitution]” (87).

Of course, we could also provide examples of Chávez lamenting the plight of the poor and emphasizing economic policy. To characterize his rhetoric somewhat more systematically, and to compare it with that of Henrique Salas Römer—Chávez’s principal opponent in the 1998 presidential campaign—we focus on a small set of television interviews: those conducted on the long-running talk show *Front Page*, hosted by network executive Marcel Granier. During the campaign, Granier interviewed Chávez once and Salas Römer three times. Each of the four interviews lasted approximately sixty minutes. The limitation of this approach is that the corpus is small; the advantage is that it allows us to observe both candidates in roughly similar settings.

¹⁹The first four republics ran from 1810–1812, 1813–1814, 1817–1819, and 1830–1999, respectively.

Table 1: Chávez Stressed Constitution, Opponent Talked More About Poverty

Using topic-specific dictionary words (see main text), we compare the (normalized) frequency with which Chávez and his opponent addressed two themes—the constituent assembly and poverty—during appearances on the television show *Front Page*.

	Chávez	Salas Römer	Difference
Constituent Assembly	3.35	1.93	1.42
Poverty, Inequality	1.86	2.50	−0.64
Poverty:Assembly Ratio	0.56	1.30	

Theme prevalence per 1,000 words.

We approach the *Front Page* interviews in two ways. First, we estimate and compare the frequency with which each candidate addressed two particular topics: *institutional change* and *poverty*.²⁰ Second, we describe the interviews qualitatively.

To estimate the prevalence of our two topics of interest in this corpus, we first construct topic-specific dictionaries. Using pre-trained word embeddings, we identify terms that tend to co-occur with the seed words *constituent assembly* (for the institutional change topic) and *poverty* (see Appendix A for details). We then use the resulting dictionaries to estimate the prevalence of each topic in each candidate’s *Front Page* appearances. Table 1 presents the results. Chávez spoke about the constituent assembly at approximately twice the rate of Salas Römer, while Salas Römer spoke much more (than Chávez) about poverty and inequality. Moreover, while both candidates devoted more time to institutional change than to poverty, the difference was considerably larger (both in absolute terms and in relative terms) for Chávez than for Salas Römer. Given the small size of the corpus, these results are far from definitive. But they are consistent with the widely held view of Chávez as a candidate who campaigned on his proposal to remake Venezuela’s political institutions.

Qualitatively, the *Front Page* interviews help clarify why there was ambiguity about the direction of institutional change under Chávez, despite his past as leader of a (failed) coup d’état. We address three points: (1) how he described his vision for a new Venezuelan democracy, (2) the coup itself, and (3) Chávez’s language toward his political opponents.

Many accounts portray Chávez in 1998 as a candidate who promised to raze hor-

²⁰In Appendix A, we estimate a topic model using the universe of Chávez’s speeches and interviews. The results confirm the conventional wisdom that *institutional change* and *poverty* (or economic policy) were the primary topics in the 1998 campaign; no other topic approaches their prevalence.

Table 2: Comparison of Campaign Rhetoric from TV Interviews on *Front Page*

Marcel Granier (host)	Hugo Chávez Frías, October 18, 1998
Tell me which of the people’s problems will be resolved by the constituent assembly. Will it create jobs? Improve the quality of education? Improve health? Reduce the cost of living? Improve citizen security?	<p>We can’t think of the constituent assembly in those terms . . . the objective is not to create jobs. My opponent says “you can’t eat [a new constitution],” but that’s reductive. You’re a Catholic like me, so you know that, in the Bible, Satan tells Jesus in the desert: “If thou be the Son of God, command that these stones be made bread.” And Jesus replies, “Man does not live by bread alone.” We can’t view the world as existing just to create jobs. Jobs are necessary, of course, but that’s about our economic and social systems more than the political system . . . That’s why [the constituent assembly] has as its sole objective to transform the political system . . . I don’t think that there’s a single Venezuelan who would defend it.</p> <p>It’s also part of our platform to create jobs, boost the agricultural sector, tourism—but that doesn’t depend on the constituent assembly, that depends on the Executive, on businesses, on international investment that we are already attracting.</p>
Why was [one of your allies] criticizing businesspeople who support your opponent?	I can’t speak for him [the ally]. Coming back to the topic of the constituent assembly, it’s not to feed people, Granier . . . it has the fundamental objective of transforming the political system.
Why not reform the constitution via Congress?	<p>No, Granier, I’m not going to fall in that trap. The country needs a fast track, a fast way to solve the drama of a political system that is rotten—and our proposal is fast, democratic, and depends on the will of the people: the constituent assembly, whose objective, I repeat, is not to give people food (for that there is the economic model, to generate jobs), it’s to transform the political system. And something very important: to relegitimize it, a new model of the State.</p> <p>We propose to curb presidentialism, which still has an imperial feel in Venezuela. A president should be leader of the country and head of state. But we need a prime minister, a new vision for the Executive Branch, and a more federal state, a real process of decentralization and deconcentration of power.</p>
Marcel Granier (host)	Henrique Salas Römer, November 1, 1998
When I asked Lieutenant Colonel Chávez about the constituent assembly, he answered with a quote from the Bible: “Man does not live by bread alone.”	<p>Well, that’s [Chávez] acknowledging that the constituent assembly won’t solve anything. The true meaning of that biblical quote is clearly <i>not</i> that we need a new congress or that we need more laws in a country that already has so many laws. That biblical quote is a reference to the fact that human beings need spiritual and cultural development . . . we’ve neglected important parts of the Venezuelan soul, but the constituent assembly is not one of them. And the fact that he is recognizing that it doesn’t solve problems, that it’s not a panacea, explains why he’s more and more defensive.</p>
The primary cleavage in Venezuelan politics is between people who support the political parties and those who do not . . . are you now proposing a new cleavage, between centralization and decentralization?	There are two candidates: [me], a son of . . . the political reforms that arose as a result of [the Caracazo] in 1989: reforms that allowed the first direct election of governors and mayors, and that began the decentralization process. The other candidate [Chávez] is a person who impatiently tried to interrupt that process of decentralization . . . I think that, at heart, Venezuelans recognize all that Acción Democrática and Copei—and to a lesser extent MAS and newer parties—did in their moment contribute to the consolidation of Venezuelan democracy.

izontal accountability, empower the president, and promote majoritarian institutions. We argue that this is a reading colored by hindsight. Far from promising to dismantle checks and balances, candidate Chávez vowed to curb Venezuela’s presidentialism, “which still [had] an imperial feel” (Table 2). He proposed to introduce a prime minister, to establish a fourth branch of government, to promote a more federal state, and to advance “a real process of decentralization and deconcentration of power.” The communication director for the Salas Römer cam-

paign, Miguel Rodríguez Siso, said in an interview for this project that Chávez “appropriated the decentralization proposal” that Salas Römer (as governor of a major state) had long championed, echoing Salas Römer’s own comments in one of his interviews on *Primer Plano* (Table 2). This is not to say that there were no signs that Chávez would move in a majoritarian or delegative direction; for one thing, he proposed to hold a referendum on convening a constituent assembly, thus embracing the “plebiscitary appeals” that are a hallmark of anti-system populism (Barr, 2009). Yet these signs were sufficiently ambiguous that several veterans of Venezuela’s decade-old decentralization efforts joined the Chávez campaign, lending credibility and credence to his claim to carry the mantle of democratizing reform.

Nor did Chávez imply that the new political institutions would shift economic policy in one direction or another. Indeed, he explicitly and repeatedly separated the constituent assembly from specific economic policy outcomes, allowing voters to project their own hopes onto a vague vision. Asked whether the constituent assembly would solve Venezuelans’ material problems, Chávez cited Jesus saying “Man does not live by bread alone” and explained that economic outcomes “do not depend on the constituent assembly” (Table 2). The objective of the constituent assembly was “not to feed people,” Chávez said, and, in case anyone missed it: “the objective, I repeat, is not to give people food.” We view these statements as evidence of an effort to deemphasize the mapping from political institutions to economic policy (to say nothing of economic *outcomes*).

Similarly, some scholars interpret Chávez’s past as the leader of a (failed) coup d’état against the elected government of Carlos Andrés Pérez as an unmistakable sign of authoritarian intentions, part of an “obvious antidemocratic record” (Levitsky and Ziblatt, 2018, 21). But Chávez told voters that his resort to violence had been valid only because then-president Pérez had himself used violence, sending security forces to kill hundreds of civilians (see Table 2). Asked whether a coup would be justified against the unpopular administration of Rafael Caldera, Chávez answered with an emphatic *no*, emphasizing that, whatever Caldera’s failings, his “was not a government that had sent troops to fire on the people.” This ambiguity is consistent with the conclusion of Canache (2002a), who studies the evolution of support for Chávez between 1995 (three years after his coup attempt) and 1998. Using two public opinion surveys, Canache finds that, in 1995, Chávez drew most of his support from the minority of Venezuelans who expressed ambivalence about democracy. By 1998, in contrast, Chávez drew at least half of his support from Venezuelans unequivocally committed to democracy. For Canache, this result supports the *converted militant* hypothesis: that Chávez successfully convinced a significant fraction of voters that he would protect democracy. In fact, some of the most committed democrats in Venezuelan politics in the 1990s (Teodoro

Petkoff, for example; Handlin, 2017) were themselves converted militants, having left the guerrilla after the 1960s. For these reasons, we contend that Chávez’s history did not entirely negate his claim that he would democratize Venezuelan political institutions.

Moreover, the most dramatic alleged example of Chávez’s violent language was fabricated. An influential attack ad apparently included audio of him promising to “eliminate Adecos from the face of the earth, fry their heads in oil, and dissolve them in acid.” Marcel Granier, host of *Primer Plano*, repeated this line in his interview with Salas Römer. But, as it turned out, someone had hired actor Gonzalo Cubertos to impersonate Chávez saying these lines; when Cubertos publicly admitted this, the Venezuelan electoral council ordered the attack ad off the air, allowing Chávez to tell audience after audience that the fabrication was evidence of his commitment to peace: if his discourse were really so violent, he pointed out, his opponents would not have had to fabricate evidence to the contrary (Socorro, 2018).

3 Alternative Explanations

We interpret these three findings as evidence that Chávez first won election not primarily by exploiting class conflict but rather by tapping into cross-cutting anti-system sentiment. One alternative interpretation is that the fleeting electoral realignment we observe in 1998 had little to do with Chávez and everything to do with the collapse of the Venezuelan party system (Morgan, 2011; Lupu, 2016). It stands to reason that widespread rejection of traditional parties would shuffle coalitions, at least temporarily. Yet party-system collapse does not always redraw cleavages. Seawright (2012) argues that voters’ abandonment of traditional parties in Peru—comparable in magnitude to that of Venezuela—led an outsider (Alberto Fujimori) to win simply by capturing an existing bloc: the ideological right (141). Chávez, in contrast, while certainly appealing to left-wing voters, was vehemently opposed by the former icon of the Venezuelan left, and briefly joined by one of the country’s most prominent right-wingers.²¹

A second way to rationalize the cross-cutting Chávez vote as the direct result of in-

²¹Ideally, we would study the relationship between ideology and vote choice systematically over time; unfortunately, the historical surveys do not allow for this. In the 1998 Latinbarometer survey, intention to vote for Chávez did decline with ideological self-placement (on a 1–10 left–right scale), though Chávez outperformed his main opponent even among center-right respondents (self-placement = 7); among the farthest-right respondents (self-placement = 10), Chávez earned 30% to his opponent’s 39%. See also Appendix C. By “former icon of the Venezuelan left,” we mean Teodoro Petkoff. By “prominent right-winger,” we mean Oswaldo Álvarez Paz, who briefly joined Chávez’s commission on rewriting the constitution.

come considerations is to follow Weyland’s observation that economic losses make voters risk-loving, or at least risk-tolerant (2004). If we view outsider candidates as risky, Venezuela’s 1980s–1990s economic collapse should have whet voters’ appetites for outsiders. This explanation is not incompatible with ours, though (on its own) it does not clearly explain either voters’ preference for Chávez over other outsiders or the quick disintegration of the initial coalition.

Other scholars might point to the 1999 referendum on Chávez’s new constitution as evidence against our emphasis on *ambiguity*: by then, with all 350 articles of the constitution written and published, what ambiguity might remain? Voters approved that constitution in a referendum, suggesting, perhaps, that they endorsed not only Chávez’s vague call for *change* but also his specific, centralizing institutional reforms and their policy consequences (Acemoglu et al., 2013b). We would counter, first, that even after the constitution was drafted there remained considerable ambiguity about the mapping between de jure institutional arrangements and policy outcomes (Shepsle, 1986, 75); Crisp (2000, 234) even expressed optimism about certain features of the new electoral system. Second, Chávez’s most authoritarian moves (in that period) occurred not through the constitution itself but around and outside of it, through a series of decrees not submitted to voters (Brewer-Carias, 2005). These decrees, the most dramatic of which arrived *after* the popular referendum on the new constitution, granted such power to Chávez that they alienated even some of the constitution’s architects and most zealous champions.

Finally, we note that our results are not inconsistent with polarization and/or inequality as explanations for *subsequent* votes for Chávez (in particular, his re-election in 2006 and 2012), as proposed especially by Svolik (2020). In those years, we find, the pro-vs.-anti-Chávez vote *did* split along socio-economic lines (Handlin, 2013; cf. Lupu, 2010). Indeed, if our argument is correct, Chávez’s initial coalition fell apart, requiring him to assemble a new one in its place.

4 Conclusion

In 2017, well before the election of Jair Bolsonaro as President of Brazil, a Brazilian comedy group made a video in which a woman arrives at a department store determined to exchange her president (Zorra, 2017). The salesman walks her around a showroom pointing to possible alternatives: monarchy (“classic!”), parliamentary democracy (“cool!”), and, finally, a military regime. “I like this one,” the customer says. “If anything goes wrong, I’ll just bring it back.” The general on the display responds: “Take me back? I don’t think so. You’re stuck with me for a minimum of twenty years.” As his officers escort the customer out of the

store, the salesman calls after her: “Sorry, once you activate it, it’s on autopilot!”

This captures the spirit of our argument. Elected autocrats come to power not because voters correctly anticipate the consequences for (re)distributive policy but because of ambiguity about the direction of future institutional change, and because of uncertainty about the mapping between institutional arrangements and policy outcomes. Exploiting this uncertainty together with cross-cutting anti-system sentiment, Hugo Chávez won election with a mandate to democratize Venezuela—only to usurp power “by surprise” (Stokes, 2001), quickly alienating many of his early allies.

Our empirical analysis focuses on Venezuela, but the argument is general. Evo Morales in Bolivia and Rafael Correa in Ecuador, for example, both campaigned on promises to cure the ills of their countries’ democracies by remaking political institutions; both of the resulting new constitutions then concentrated power in their respective presidencies (Anria, 2016, 2018; Corrales, 2008; Corrales and Penfold, 2014; Corrales, 2018). Sufficient numbers of Bolivian and Ecuadoran voters disliked this outcome that they subsequently voted to reinstate (or maintain) presidential term limits (AP, 2018; Idrobo et al., 2022). These cases underscore our conclusion that ambiguity and anti-system sentiment merit renewed attention in the study of democratic deconsolidation.

References

- Daron Acemoglu, Georgy Egorov, and Konstantin Sonin. A political theory of populism. *The Quarterly Journal of Economics*, 128(2):771–805, 2013a.
- Daron Acemoglu, James Robinson, and Ragnar Torvik. Why Do Voters Dismantle Checks and Balances? *The Review of Economic Studies*, 80(3):845–875, July 2013b.
- Santiago Anria. Delegative democracy revisited: More inclusion, less liberalism in bolivia. *Journal of Democracy*, 27(3):99–108, 2016.
- Santiago Anria. *When movements become parties: The Bolivian MAS in comparative perspective*. Cambridge University Press, 2018.
- AP. Ecuador votes to limit presidents’ terms in blow to rafael correa. *The Guardian*, 2018.
- Enrique Baloyra and John Martz. 1973 pre-election poll. *Basic Political Attitudes of the Venezuelan People*, 1973.
- Enrique Baloyra and John Martz. *Political Attitudes in Venezuela: Societal Cleavages and Political Opinion*. University of Texas Press, 1979.
- Enrique Baloyra and Aristides Torres. Study of opinion on attitudes toward democracy and evaluation of democratic government since 1958. *Universidad Simon Bolivar Latin American Data Bank*, 1983.
- Robert R Barr. Populists, outsiders and anti-establishment politics. *party politics*, 15(1):29–48, 2009.
- Sheri Berman. The causes of populism in the west. *Annual Review of Political Science*, 24:71–88, 2021.
- Nancy Bermeo. On democratic backsliding. *Journal of Democracy*, 2016.
- David M Blei, Andrew Y Ng, and Michael I Jordan. Latent dirichlet allocation. *Journal of machine Learning research*, 3(Jan):993–1022, 2003.
- Allan R Brewer-Carias. La progresiva y sistemática demolición de la autonomía en independencia del poder judicial en venezuela (1999-2004). *XXX Jornadas JM Dominguez Escovar, Estado de derecho, Administración de justicia y derechos humanos*, pages 33–174, 2005.
- Peter Buisseret and Richard Van Weelden. Crashing the party? elites, outsiders, and elections. *American Journal of Political Science*, 64(2):356–370, 2020.

- Julia Buxton. Economic policy and the rise of hugo Chávez. In Steve Ellner and Daniel Hellinger, editors, *Venezuelan Politics in the Chávez Era: Class, Polarization, and Conflict*. Lynne Rienner, 2003.
- Soner Cagaptay. The november 2002 elections and turkey’s new political era. *Middle East*, 6(4):43, 2002.
- Soner Cagaptay. *The new sultan: Erdogan and the crisis of modern Turkey*. Bloomsbury Publishing, 2020.
- Damarys Canache. From bullets to ballots: The emergence of popular support for hugo Chávez. *Latin American Politics and Society*, 2002a.
- Damarys Canache. *Venezuela: Public Opinion and Protest in a Fragile Democracy*. North-South Center Press, 2002b.
- Darío Canton and Jorge Raúl Jorrat. Economic Evaluations, Partisanship, and Social Bases of Presidential Voting in Argentina, 1995 and 1999. *International Journal of Public Opinion Research*, 14(4):413–427, 12 2002.
- Cristian Cardellino. Spanish Billion Words Corpus and Embeddings, August 2019. URL <https://crscardellino.github.io/SBWCE/>.
- Ali Carkoglu. Turkey’s november 2002 elections: A new beginning? *Middle east review of international affairs*, 6(4):30–41, 2002.
- Hugo Chávez Frías. Discurso del comandante presidente hugo Chávez ante la 54 asamblea anual de fedecámaras. *Discursos y Alocuciones*, July 30, 1998.
- Caterina Chiopris, Monika Nalepa, and Georg Vanberg. A wolf in sheep’s clothing: Citizen uncertainty and democratic backsliding. *Working Paper*, 2021.
- J. Corrales and M. Penfold. *Dragon in the Tropics: Venezuela and the Legacy of Hugo Chavez*. Brookings Latin America Initiative book. Brookings Institution Press, 2015.
- Javier Corrales. In search of a theory of polarization: Lessons from venezuela, 1999-2005. *Revista Europea de Estudios Latinoamericanos y del Caribe / European Review of Latin American and Caribbean Studies*, (79):105–118, 2005.
- Javier Corrales. Latin america’s neocaudillismo: Ex-presidents and newcomers running for president... and winning. *Latin American Politics and Society*, 50(3):1–35, 2008.
- Javier Corrales. *Fixing democracy: Why constitutional change often fails to enhance democracy in Latin America*. Oxford University Press, 2018.

- Javier Corrales and Michael Penfold. Manipulating term limits in latin america. *Journal of democracy*, 25(4):157–168, 2014.
- Brian F Crisp. *Democratic institutional design: the powers and incentives of Venezuelan politicians and interest groups*. Stanford University Press, 2000.
- Romain Deveaud, Eric SanJuan, and Patrice Bellot. Accurate and effective latent concept modeling for ad hoc information retrieval. *Document numérique*, 17(1):61–84, 2014.
- Thad Dunning. *Crude Democracy: Natural Resource Wealth and Political Regimes*. Cambridge University Press, 2008.
- Steve Ellner. Introduction: The search for explanations. In Steve Ellner and Daniel Hellinger, editors, *Venezuelan Politics in the Chávez Era: Class, Polarization, and Conflict*. Lynne Rienner, 2003.
- Steve Ellner. The distinguishing features of latin america’s new left in power: The chávez, morales, and correa governments. *Latin American Perspectives*, 39(1): 96–114, 2012.
- Nicholas Eubank. Political entrepreneurs and electoral realignmnets: Individual agency in politics revisited. *Working Paper*, 2012.
- Judith Ewell. The extradition of marcos pérez jiménez, 1959–63: Practical precedent for enforcement of administrative honesty? *Journal of Latin American Studies*, 1977.
- Leslie Gates. *Electing Chávez: The Business of Anti-Neoliberal Politics in Venezuela*. Pittsburgh University Press, 2010.
- Matthew H. Graham and Milan W. Svolik. Democracy in america? partisanship, polarization, and the robustness of support for democracy in the united states. *American Political Science Review*, 114(2):392–409, 2020.
- Kenneth F Greene. Dominant party strategy and democratization. *American Journal of Political Science*, 52(1):16–31, 2008.
- Samuel A Greene and Graeme Robertson. Affect and autocracy: Emotions and attitudes in russia after crimea. *Perspectives on Politics*, 2020.
- Edoardo Grillo and Carlo Prato. Reference points and democratic backsliding. *Working Paper*, 2020.
- Alferdo Guerra Guevara. Political retaliation to petition signing: The case of venezuela’s 2004 presidential recall referendum. *Working Paper*, 2019.

- Sergei Guriev. Economic drivers of populism. In *AEA Papers and Proceedings*, volume 108, pages 200–203, 2018.
- Stephan Haggard and Robert Kaufman. The anatomy of democratic backsliding. *Journal of Democracy*, 32(4):27–41, 2021.
- Samuel Handlin. Survey Research and Social Class in Venezuela: Evaluating Alternative Measures and Their Impact on Assessments of Class Voting. *Latin American Politics and Society*, 2013.
- Samuel Handlin. *State Crisis in Fragile Democracies: Polarization and Political Regimes in Latin America*. Cambridge University Press, 2017.
- K.A. Hawkins. *Venezuela’s Chavismo and Populism in Comparative Perspective*. Cambridge University Press, 2010.
- Chang-Tai Hsieh, Edward Miguel, Daniel Ortega, and Francisco Rodriguez. The price of political opposition: Evidence from venezuela’s maisanta. *American Economic Journal: Applied Economics*, 3(2):196–214, 2011.
- Nicolás Idrobo, Dorothy Kronick, and Francisco Rodríguez. Do shifts in late-counted votes signal fraud? evidence from bolivia. *Journal of Politics*, 2022.
- Leyla D Karakas and Devashish Mitra. Inequality, redistribution and the rise of outsider candidates. *Games and Economic Behavior*, 124:1–16, 2020.
- LAPOP. El barómetro de las américas: Venenezuela, 2012. *Vanderbilt University*, 2012.
- Steven Levitsky and Daniel Ziblatt. *How Democracies Die*. Crown Publishing Group, 2018.
- Bill Lomax. The 1998 elections in hungary: third time lucky for the young democrats. *Journal of Communist Studies and Transition Politics*, 15(2):111–125, 1999.
- Margarita López-Maya. The rise of causa r: A workers’ party shakes up the old politics. *NACLA*, 1994.
- Zhaotian Luo and Adam Przeworski. “democracy and its vulnerabilities: Dynamics of democratic backsliding.”. Working Paper, 2019.
- Noam Lupu. Who Votes for *Chavismo*?: Class Voting in Hugo Chávez’s Venezuela. *Latin American Research Review*, pages 7–32, 2010.

- Noam Lupu. *Party Brands in Crisis: Partisanship, Brand Dilution, and the Breakdown of Political Parties in Latin America*. Cambridge University Press, 2016.
- Noam Lupu and Susan C. Stokes. The social bases of political parties in argentina, 1912-2003. *Latin American Research Review*, 44(1):58–87, 2009.
- Jennifer McCoy and David Myers. *The Unraveling of Representative Democracy in Venezuela*. The Johns Hopkins University Press, 2004.
- Jennifer L McCoy. Latin america’s imperiled progress: Chavez and the end of partyarchy” in venezuela. *Journal of Democracy*, 10(3):64–77, 1999.
- Tomas Mikolov, Kai Chen, Greg Corrado, and Jeffrey Dean. Efficient estimation of word representations in vector space. *arXiv preprint arXiv:1301.3781*, 2013.
- Gary Miller and Norman Schofield. Activists and partisan realignment in the united states. *American Political Science Review*, pages 245–260, 2003.
- Jana Morgan. *Bankrupt representation and party system collapse*. Penn State Press, 2011.
- Yascha Mounk. *The People vs. Democracy: Why Our Freedom is in Danger and How to Save It*. Harvard University Press, 2018.
- D.C. Mutz. *Winners and Losers: The Psychology of Foreign Trade*. Princeton Studies in Political Behavior. Princeton University Press, 2021. ISBN 9780691203034. URL <https://books.google.com/books?id=0XogEAAQBAJ>.
- David J Myers. Urban voting, structural cleavages, and party system evolution: the case of venezuela. *Comparative Politics*, 8(1):119–151, 1975.
- Daniel Ortega and Francisco Rodríguez. Freed from illiteracy? a closer look at venezuela’s misión robinson literacy campaign. *Economic Development and Cultural Change*, 57(1):1–30, 2008.
- Jeffrey Pennington, Richard Socher, and Christopher Manning. Glove: Global vectors for word representation. In *Proceedings of the 2014 conference on empirical methods in natural language processing (EMNLP)*, pages 1532–1543, 2014.
- William H. Riker. *The Art of Political Manipulation*. Yale University Press, 1986.
- Kenneth Roberts. Social polarization and the populist resurgence in venezuela. *Venezuelan politics in the Chávez era: Class, polarization, and conflict*, pages 55–72, 2003.

- Roger Santodomingo. *La conspiración 98: un pacto secreto para llevar a Hugo Chávez al poder*, volume 16. Editorial Alfa, 1999.
- Gábor Scheiring. *The retreat of liberal democracy: Authoritarian capitalism and the accumulative state in Hungary*. Springer, 2020.
- Norman Schofield. Valence competition in the spatial stochastic model. *Journal of Theoretical Politics*, 15(4):371–383, 2003.
- Jason Seawright. *Party-system collapse: the roots of crisis in Peru and Venezuela*. Stanford University Press, 2012.
- Kenneth Shepsle. Institutional equilibrium and equilibrium institutions. In *Political Science: The Science of Politics*. Algora Publishing, 1986.
- John Sides, Michael Tesler, and Lynn Vavreck. *Identity crisis*. Princeton University Press, 2019.
- Milagros Socorro. Fake news before that was even a thing. Caracas Chronicles, 2018.
- Hillel David Soifer. Units of analysis in subnational research. In Agustina Giraudy, Eduardo Moncada, and Richard Snyder, editors, *Inside countries: Subnational research in comparative politics*. Cambridge University Press, 2019.
- Arthur Spirling and P Rodriguez. Word embeddings: What works, what doesn’t, and how to tell the difference for applied research. Technical report, Working paper, 2019.
- Susan C Stokes. *Mandates and democracy: Neoliberalism by surprise in Latin America*. Cambridge University Press, 2001.
- J.L. Sundquist. *Dynamics of the Party System: Alignment and Realignment of Political Parties in the United States*. Brookings Institution Press, 2011.
- Milan W Svolik. When polarization trumps civic virtue: Partisan conflict and the subversion of democracy by incumbents. *Quarterly Journal of Political Science*, 15(1):3–31, 2020.
- Anna Szilágyi and András Bozóki. Playing it again in post-communism: The revolutionary rhetoric of viktor orbán in hungary. *Advances in the History of Rhetoric*, 18(sup1):S153–S166, 2015.
- Aaron Tornell. Reform from within, 1998.

- Alejandro Velasco. *Barrio Rising: Urban Popular Politics and the Making of Modern Venezuela*. University of California Press, 2015.
- George Ward, Jan-Emmanuel De Neve, Lyle H Ungar, and Johannes C Eichstaedt. (un) happiness and voting in us presidential elections. *Journal of personality and social psychology*, 120(2):370, 2021.
- Kurt Weyland. Economic voting reconsidered: Crisis and charisma in the election of hugo Chávez. *Comparative Political Studies*, 2003.
- Kurt Weyland. *The politics of market reform in fragile democracies: Argentina, Brazil, Peru, and Venezuela*. Princeton University Press, 2004.
- Dengyong Zhou, Olivier Bousquet, Thomas N Lal, Jason Weston, and Bernhard Schölkopf. Learning with local and global consistency. In *Advances in neural information processing systems*, pages 321–328, 2004.
- Zorra. Queria cambiar el presidente. [YouTube](#), 2017.

Appendix

A	Additional quantitative evidence on Chávez’s rhetoric	29
A.1	Method for estimating the prevalence of key topics	29
A.2	Topic model results	30
B	Details on Public Opinion Surveys	33
C	Correlation with past anti-system votes	36
D	Additional tables and figures	38
E	Scatter plots for electoral realignment result	41

A Additional quantitative evidence on Chávez’s rhetoric

In the main text, we estimate the prevalence of two topics—*institutional change* and *poverty*—in campaign-trail interviews of the two principal candidates in the 1998 presidential election (Hugo Chávez and Henrique Salas Römer). In this appendix, we: (1) provide details of the method and (2) estimate a topic model to help evaluate whether our approach misses other important topics.

A.1 Method for estimating the prevalence of key topics

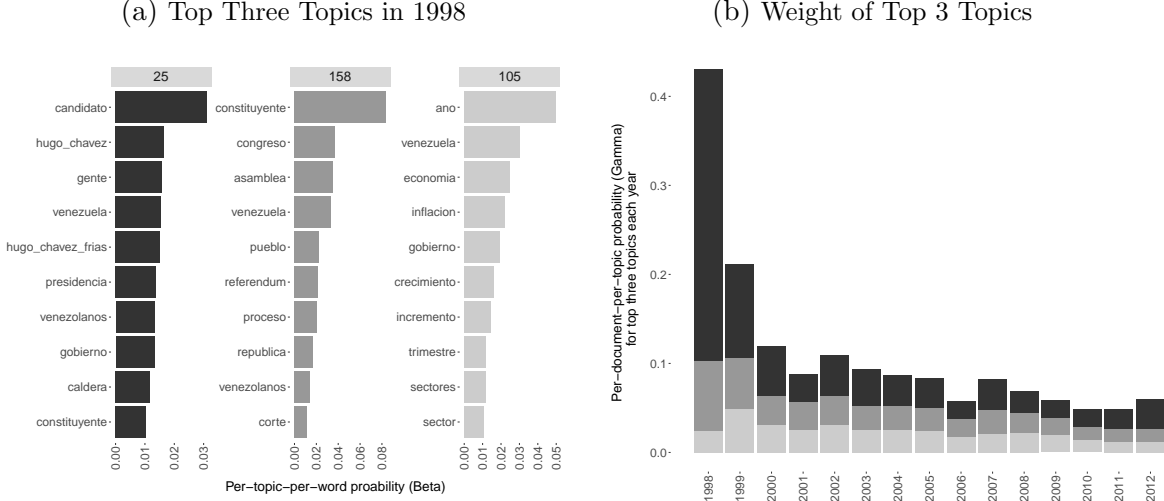
We propose a method that leverages pre-trained word embeddings to guide the construction of topic-specific dictionaries. Using embeddings trained on huge collections of Spanish-language text,²² we learn which words tend to co-occur with two key seed words—“poverty” and “constituent assembly” (*constituyente*)—we then use this information to build a dictionary of words associated with each topic. The method is as follows:

1. Given a vocabulary V , construct a weighted lexical graph wherein links are weighted by the cosine distance between words on the (pre-trained) embedding space. In our case, the vocabulary V comprises all words that appear in our corpus –interview transcripts– minus a standard set of stopwords.
2. For a given seed s (or set of seeds) that define the topic of interest, propagate a ‘topic label’ using the random walk algorithm proposed by Zhou et al. (2004). This method yields a ‘topical relevance score’ for every word $w \in V$ equivalent to the probability that a random walk initiated at the seed word lands on w . We use the seed *poverty* for the economic policy topic and *constituyente* (constituent assembly) for the institutional change topic.
3. To approximate a measure of score uncertainty, iterate this process for N randomly selected seeds (we use $N = 100$). For each word $w \in V$, there are now 101 topical relevance scores: one for the seed s (*poverty* or *constituyente*), and 100 for the randomly selected comparison words. Candidate words for the dictionary are those words w that have a higher topical relevance score for the seed s than for some threshold proportion of the randomly

²²Word embeddings are dense vector representations of words learned from local co-occurrence statistics in huge collections of text. Unlike traditional distributional semantic models, the co-occurrence statistics used to train embedding models come from small—usually symmetric—windows of text around each word (see Spirling and Rodriguez (2019) for a useful introductory discussion). They have been shown to capture well ‘human’ semantics (Mikolov et al., 2013; Pennington et al., 2014).

Figure A.5: Top Themes According to Topic Model

Fig. (a) lists the words associated with the top-three most-prevalent topics in Chávez’s speech in the year 1998; Fig. (b) plots the prevalence of these three topics in Chávez’s speech over time.



selected words; we use 0.95.

- Have human coders validate candidate words for inclusion in the dictionary.²³
- If necessary (e.g., in the case that there are too few candidate terms) repeat the process using the set of validated words as seeds.

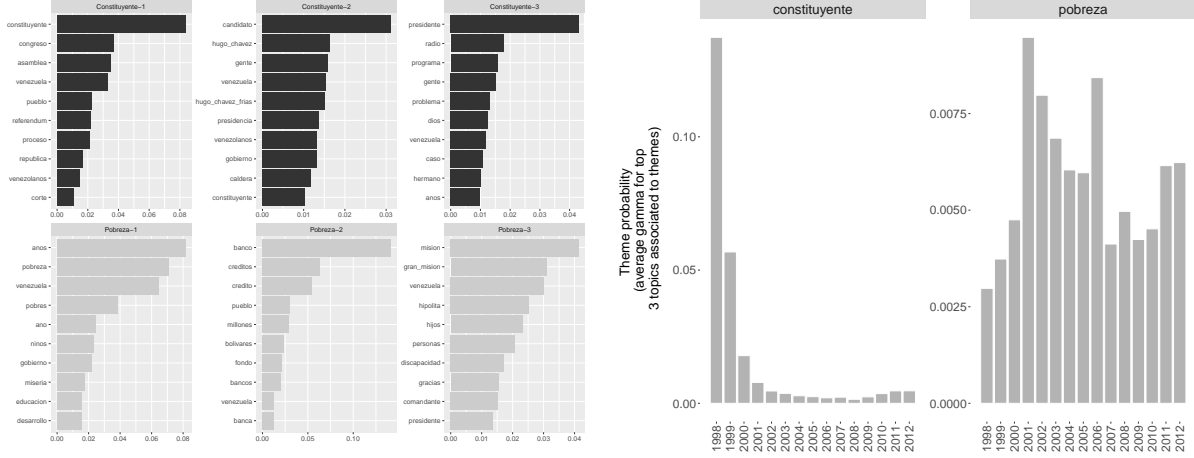
For our pre-trained embeddings, we use **GloVe**, trained on the Spanish Billion Word Corpus (Cardellino, 2019). These embeddings have been shown to correlate highly with embeddings trained on a subset of political texts (Spirling and Rodriguez, 2019).

A.2 Topic model results

By restricting our analysis to two themes—institutional change and economic policy—we may miss other important topics. To evaluate this possibility, we use the full corpus of Chávez’s speeches and interviews to estimate a topic model

²³We validated and selected the top 20 words for each topic. The selected words for the *institutional change* topic are: constituyente, constitucion, constitucional, legislativa, constituyentes, referendum, legislativo, democraticamente, congreso, sufragio, electo, reelecto, electos, convocar, suprema, senado, independentista, senadores, parlamentaria, organica. The selected words for the *poverty* topic are: pobreza, extrema, pobres, erradicar, desempleo, inseguridad, milenio, mortalidad, marginalizacion, desarrollo, viven, injusticia, reconociendo, reduccion, globalizacion, combatir, ignorancia, violencia, economica, metas.

Figure A.6: Institutional Change Dominates Election; Economy Dominates Later
Fig. (a) lists the words associated with the top-three most-prevalent topics in Chávez’s speech in the year 1998; Fig. (b) plots the prevalence of these three topics in Chávez’s speech over time.
(a) Top Topics by Theme (b) Theme Prevalence Over Time



(Blei et al., 2003). The model has 165 topics, the number that maximizes the pairwise information divergence across all topics (Deveaud et al., 2014). Figure A.5a plots the 10 terms associated with the three most-prevalent topics in 1998. We might label the first topic *election*, with mentions of Hugo Chávez (then candidate), Caldera (then incumbent), Venezuelans, and *presidency*; the second topic is clearly the constituent assembly (*constituyente*; and the third topic appears to be the economy, with terms like *economy*, *inflation*, and *growth*. Figure A.5b plots the prevalence of these three topics over time, showing that they collectively accounted for more than 40% of Chávez’s words in 1998. Confirming conventional wisdom, this analysis suggests that the 1998 campaign did not focus on a topic other than those we consider in our primary analysis.

We also use the topic model to check our intuition that Chávez campaigned on institutional change but then turned his focus to economic policy in later years, perhaps consistent with the vote-choice analysis of Section 2.2 in the main text. To do so, we estimate the prevalence of the *institutional change* theme by combining the three (of 165) topics that assign the highest probability to the term *constituyente* (constituent assembly); we estimate the prevalence of the *economic policy* theme by combining the three (of 165) topics that assign the highest probability to the term *poverty*. Figure A.6a lists the terms associated with each of the six selected topics; the vast majority of the terms appear clearly linked to the two themes of interest. Figure A.6b plots the prevalence of these two themes over time. Consistent with our claims, we observe that the *institutional change* theme had

a very high prevalence during the campaign (nearly 15% of words were generated from this theme) but declined quickly over time; indeed, Chávez talked about the *constituyente* in 1998 (during the campaign) than in 1999, it actually took place. The *economy* theme, in contrast, tripled in prevalence during Chávez’s first years in office.

In our view, these results contradict the notion that Chávez merely exploited class cleavages or left-right polarization in order to get away with dismantling checks and balances. Instead, Chávez’s speeches are consistent with the proposal that the 1998 election was less a referendum on economic policy than “a referendum on [rewriting the constitution]” (Handlin, 2017, 88).

B Details on Public Opinion Surveys

Table B.1 reports educational attainment in the Venezuelan adult population (ages 18+). Over the decades we study, the proportion of adults who did not finish primary school (6th grade) fell from the vast majority in the 1950s–60s to approximately 40% by the early 1980s and less than 10% by the 2000s.²⁴ These figures are consistent with previously reported changes in adult literacy (Ortega and Rodríguez, 2008). The proportion of adults with a college degree also increased during this period, from approximately 1% in the 1950s–60s to more than 10% by 2001.²⁵

Table B.1: Educational Attainment in the Venezuelan Population, Ages 18+

This table compares educational attainment for the 18+ population as measured in two sources: decennial censuses, and the semi-annual national household survey (analogous to the U.S. Current Population Survey). The latter began in 1967, but is only available as of 1975.

Censuses					Household Surveys				
Year	Less than Primary	Primary	High School	College	Year	Less than Primary	Primary	High School	College
1961 ¹	87%	10%	2%	1%					
1971 ²					1975	48%	39%	8%	2%
1981	44%	42%	12%	2%	1981	36%	45%	12%	3%
1990	19%	59%	13%	9%	1990	26%	48%	19%	5%
2001	9%	51%	28%	12%	2001	8%	60%	21%	11%
2011	5%	24%	47%	20%					

¹The printed volumes of the 1961 census only report attainment for the population 25+, not 18+; the 18+ population was likely more educated.

² The 1971 census did not measure attainment, due to an error in the questionnaire.

The public opinion surveys capture these changes. Table B.2 reports educational attainment among respondents in the public opinion surveys; as in the population, the share with less-than-primary education falls from more than 40% in the 1970s to 20% by the early 1990s and then less than 10% by the 2000s (the 1983 survey appears to slightly over-represent educated respondents). And as in the population, the share with college degrees increases from 1% to more than 10%.

The weights included in the 1993–2006 surveys actually render the sample *less* representative of the true distribution of educational attainment, which is why we report unweighted results in the main text (though applying the weights makes

²⁴Neither the 1950 census nor the 1961 census clearly reported attainment in the 18+ population, but the 25+ numbers from the 1961 census strongly suggest that a majority of adults 18 had not completed primary school.

²⁵The 2011 census figure of 20% is likely overstated, and the household surveys are not publicly available after 2006.

Table B.2: Educational Attainment in Public Opinion Surveys

This table reports educational attainment as recorded in the nine public opinion surveys analyzed in the main text, for comparison with the population proportions in Table B.1.

Year	Unweighted				Weighted			
	Less than Primary	Primary	High School	College	Less than Primary	Primary	High School	College
1973	41%	41%	17%	1%	.	.	.	.
1983	20%	49%	25%	6%	.	.	.	.
1988	22%	47%	25%	5%	.	.	.	.
1993	19%	52%	22%	6%	17%	47%	20%	16%
1998	12%	41%	24%	23%	19%	46%	20%	16%
2000	9%	42%	34%	15%	20%	43%	20%	17%
2004	14%	32%	37%	17%	16%	40%	22%	22%
2006	13%	50%	26%	12%	16%	41%	23%	20%
2012	6%	35%	37%	21%	6%	35%	37%	21%

little difference, as we show in this appendix). Ideally, we would weight the samples not to make them nationally representative but rather to make the college graduates in the sample representative of college graduates in the population and to make the least-educated in the sample representative of the least-educated in the population. However, there are many characteristics one could potentially target and no theory-driven approach to selecting among them.

In Figure 3 in the main text, we report the vote-intention gap between respondents with a college degree and respondents who did not graduate from primary school—except for the first four elections (1958–1973), for which we pool high-school and college graduates because the latter make up such a tiny portion of the sample (see Tables B.1 and B.2). In the second row Table B.3, we instead consider college graduates only for these four elections (despite the small sample size). The results are qualitatively similar: for all four elections, there is a large gap between the fractions of the most- and least-educated who voted for AD. In the third row of Table B.3, we use survey weights where available (namely, for 1993–2006). The weights make little difference: there remains a large vote-intention gap in 1993 and 2006 but not in 1998 or 2000 (if anything, the gap in 1998 is in the opposite direction, with more-educated voters *more* likely to state that they intend to vote for Chávez).

Table B.3: Education–Voting Gradient, Alternative Specifications

This table reports the difference visualized in Figure 3 in the main text (i.e., $\hat{\theta}_t$ from Equation 1), compared against two alternative specifications. The first alternative specification compares college graduates to respondents with less-than-primary-school education even for years ≤ 1973 , rather than pooling high school and college graduates for these years. The second alternative specification applies survey weights where available (namely, for the 1993–06 surveys).

Specification	'58	'63	'68	'73	'78	'83	'88	'93	'98	'00	'06	'12
Reported in paper	-34.4	-30.6	-16.8	-22.2	-8	-13.7	-13.7	-9.6	2.9	-2.2	-17.5	-24.5
College only for $\leq '73$	-45.1	-22.2	-15	-34								
W/ survey weights								-9.6	6	-1	-17.9	

C Correlation with past anti-system votes

If, as we and Handlin (2017) propose, Chávez’s 1998 coalition drew voters from the left and the (much smaller) right who sought wholesale institutional change, we would expect that his vote share would correlate with those of previous anti-system challengers—even right-wing challengers. If, on the other hand, Chávez won in 1998 primarily by taking up the mantle of the neglected left (as Ellner (2003), among others, claim), we would expect his vote share to correlate with those of left challengers (whether pro- or anti-system); we would *not* expect that his performance would resemble that of right-wing anti-system parties.

Venezuela’s 1968 congressional election provides an opportunity to evaluate these predictions. That contest featured both an anti-system far-right party—the Cruzada Cívica Nacionalista, or CCN—and a pro-system far-left party, the Movimiento Electoral del Pueblo, or MEP, a splinter faction that had separated from AD the previous year (1967).²⁶

CCN and MEP held radically different visions for Venezuela. CCN was the vehicle of former military dictator Marcos Pérez Jimenez, who controlled Venezuela from 1948 through January 1958. He had been convicted of profiting from public office just four months before the election; during his trial, Pérez Jimenez publicly extolled the virtues of his dictatorship.²⁷ According to one historian who consulted the trial documents, “it appeared to the ex-dictator that dictators, even when they misused funds, accomplished more than democrats who did not steal” (Ewell, 1977, 312). In other words, CCN was unabashedly anti-system. MEP, on the other hand, had split from AD the previous year primarily because of conflict over policy issues.

CCN won 11% of the vote, earning four seats in the Senate and 21 in Congress, the fourth-best performance after AD, Copei, and MEP; MEP won 13% of the vote, five senators, and 25 Congressional representatives.²⁸ The court ultimately barred Pérez Jimenez from becoming a Senator, but other CCN politicians took their seats.

As it turns out, many districts that voted for CCN in 1968 also voted for Chávez in 1998. In fact, as Table C.1 reveals, Chávez’s 1998 vote share is more correlated with CCN’s 1968 vote share than with MEP’s. In our view, this suggests that the same types of voters—perhaps some of the same individuals—who supported

²⁶The labels “far-right” and “far-left” for CCN and MEP, respectively, come from Baloyra and Martz (1979); they also concord with our subjective assessment.

²⁷Pérez Jimenez was sentenced to less time than he had already served, so at the time of the election he was living in exile in Spain.

²⁸Both houses of congress were elected using closed-list proportional representation.

the far-right authoritarian CCN 1968 also supported Chávez in 1998; indeed, Velasco (2015) documents as much in his study of one Caracas neighborhood. We interpret this finding as evidence in favor of the notion that many voters were drawn to Chávez in 1998 because of their preference for institutional change, not exclusively because of their identification with the left or their preference for specific distributional policies.

Table C.1: Left *and* Right Anti-System Votes Predict 1998 Chávez Vote

ρ reports the bivariate correlation between (a) Chávez’s vote share in 1998 and (b) the vote share (or log vote share)[†] of the party listed in the first column, in the election listed in the second column.

Party	Election	Ideology [†]	ρ
MEP	1968, Congressional	Left	0.15
CCN	1968, Congressional	Far right	0.24
Convergencia	1993, Presidential	Center-left	0.33
LCR	1993, Presidential	Left	0.47

[†]We take the log of CCN and MEP vote shares because the relationship between the raw shares and Chávez’s share is nonlinear. There are no municipalities with zero MEP votes and four with zero CCN votes; for these, we take $\ln(0.002)$.

^{††}Baloyra and Martz (1979, 118) estimated the ideological placement of MEP and CCN in the 1960s and 1970s; the placement of Convergencia and LCR in 1993 is based on our subjective assessment, as discussed in the main text.

The 1993 presidential election is also instructive. That contest featured Andrés Velásquez, a candidate with several striking similarities to Hugo Chávez. Like Chávez, Velásquez did not come from an elite family: he entered politics through involvement with the union at SIDOR, the state steel corporation, where he had been an electrical worker; during the presidential campaign, journalists even asked whether he knew how to wear a tie (López-Maya, 1994). Like Chávez, Velásquez was a political outsider; he had been governor of the state of Bolívar, but he had never held national office. Like Chávez, Velásquez led a (previously) small left-wing party called La Causa R (*R* for radical). Like Chávez, Velásquez’s party proposed a *constituyente* to rewrite the Venezuelan constitution. In the 1993 presidential contest, he earned 22% of the vote. It was the best performance of any third party since 1968, but it was not enough to win. Table C.1 reveals that Velásquez’s 1993 vote share is highly correlated with Chávez’s vote share five years later.

D Additional tables and figures

Figure D.1: The AD and Post-2006 Chávez Coalitions were Rural

Using an original panel data set of municipal election returns, this figure plots the bivariate correlation (across municipalities) between (i) AD's or Chávez's vote share and (ii) population density in each year indicated on the x -axis.

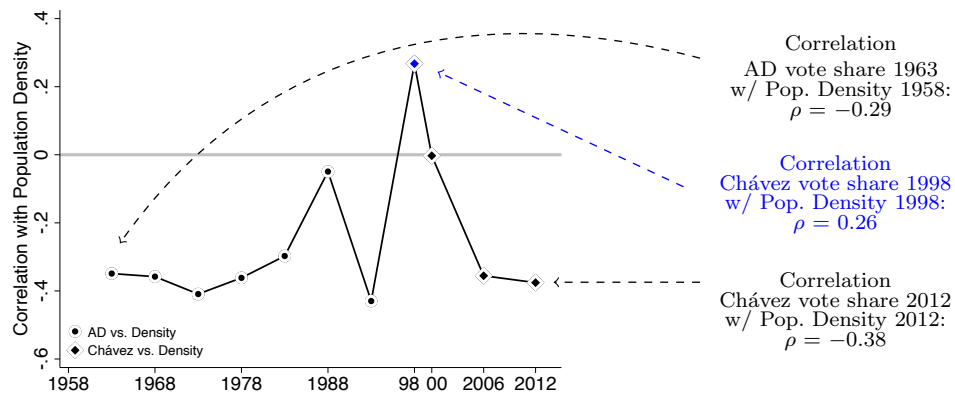
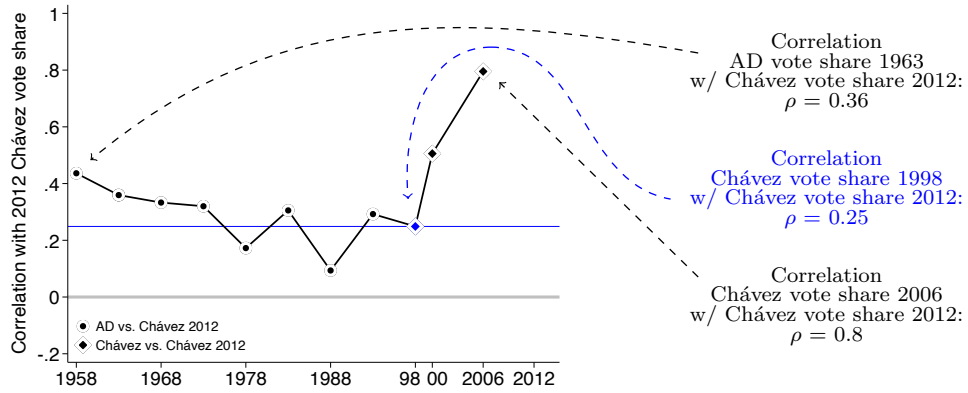


Figure D.2: Alternate Views of Inter-Election Correlations

This figure presents bivariate correlations analogous to those of Figure 1 in the main text, but using 2012 (top figure) or 1998 (bottom) rather than 1958 as the base comparison year. The takeaway is similar. The top figure shows that Chávez's 2012 vote share is more correlated with many historical AD vote shares than with Chávez's own 1998 vote. The bottom figure reveals that Chávez's inter-election correlations deteriorated more in 14 years (to $\rho = 0.25$) than AD's did in 35 years (per Figure 1, AD's 1958–1993 correlation was $\rho = 0.56$).

(a) Base Year 2012



(b) Base Year 1998

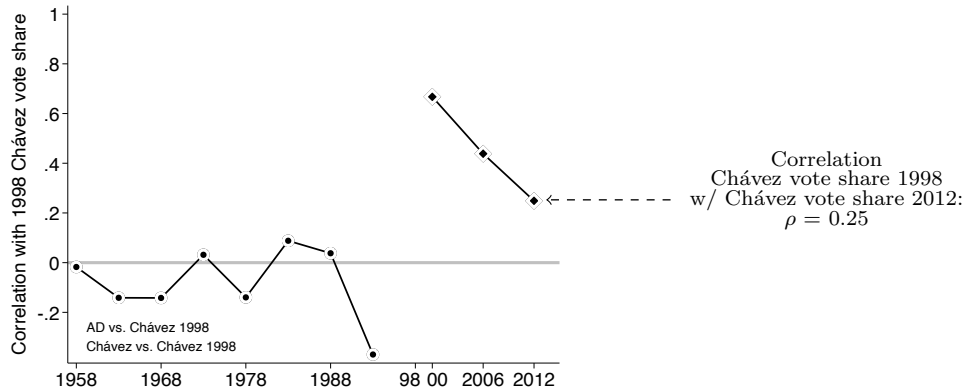
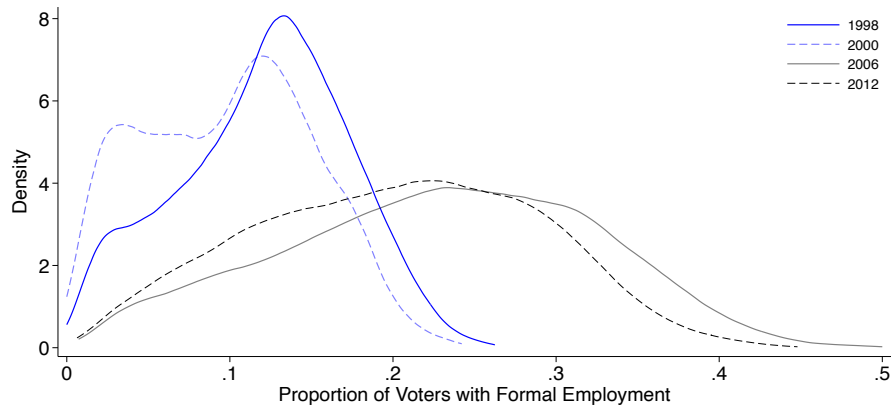


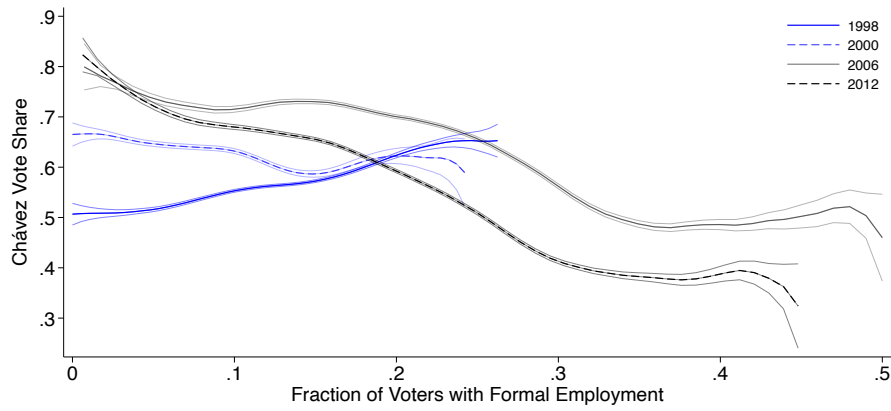
Figure D.3: Alternate View of Voting-SES Gradient

Using voting-booth-level data, Figure 4 in the main text plots Chávez's vote share in each of four presidential elections against each voting booth's *percentile* in the distribution of the fraction of voters with formal employment. Here we present those distributions (1), as well as the vote choice-SES gradient, but without transforming the x -axis (b).

(a) Distribution of % of Voters with Formal Employment in Each Election Year



(b) Vote Choice – % Formal Gradient in Each Election Year



These figures exclude the top and bottom one-tenth of one percentile.

E Scatter plots for electoral realignment result

Figure E.4: Chávez's Election Scrambled Venezuela's Electoral Map

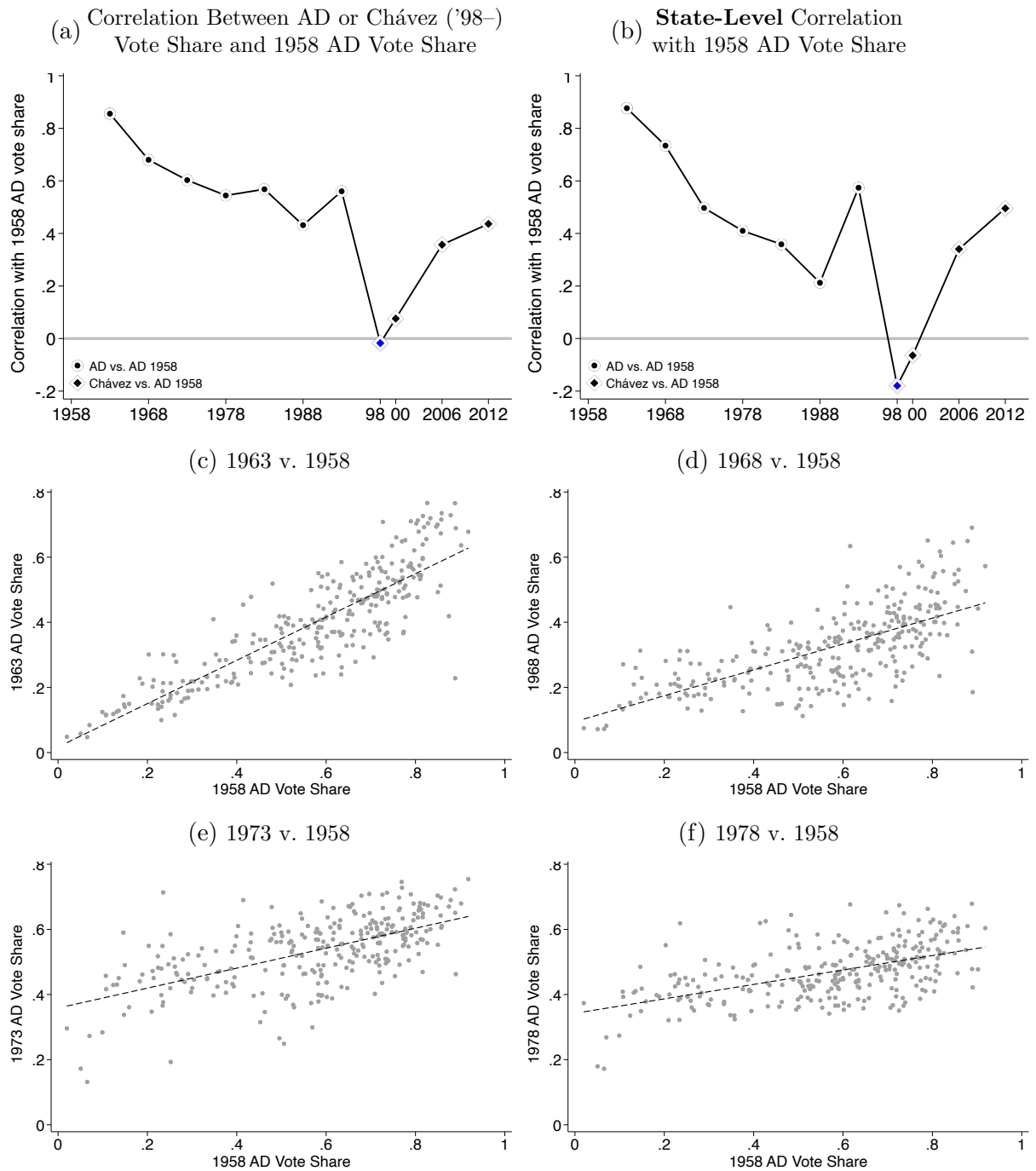
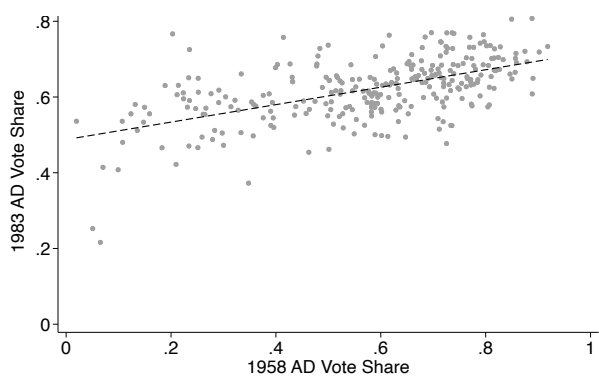
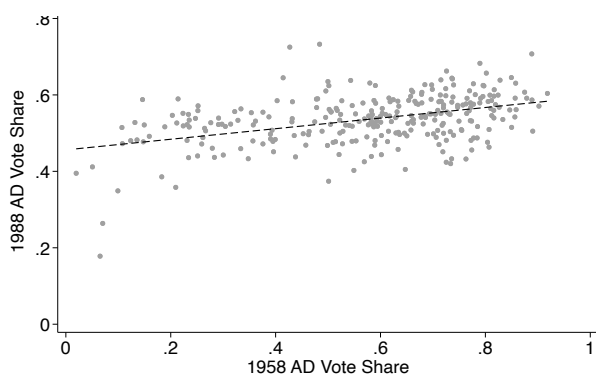


Figure C.2 Con't: Chávez's Election Scrambled Venezuela's Electoral Map

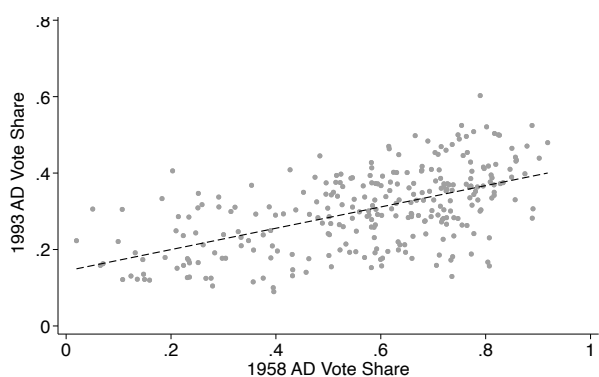
(g) 1983 v. 1958



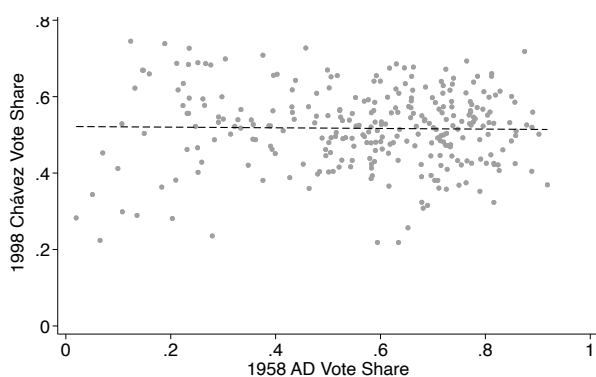
(h) 1988 v. 1958



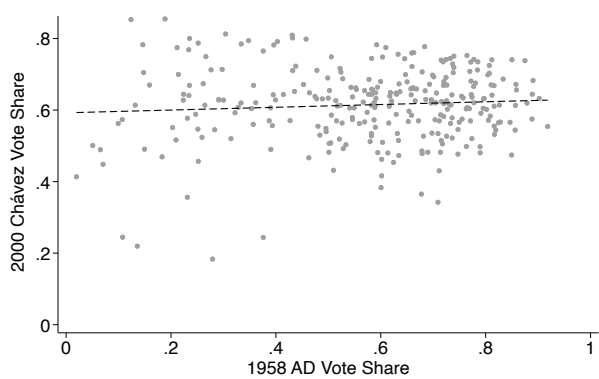
(i) 1993 v. 1958



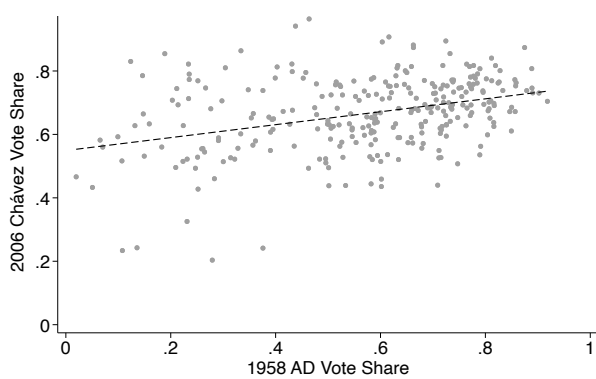
(j) 1998 v. 1958



(k) 2000 v. 1958



(l) 2006 v. 1958



(m) 2012 v. 1958

