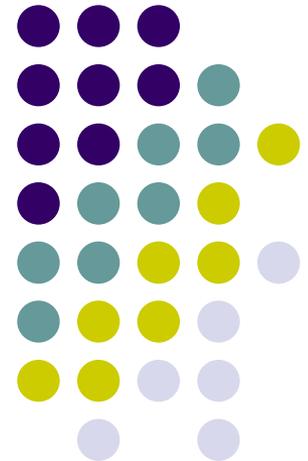
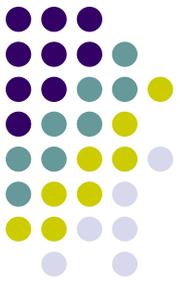


Polimetrics

Mass & Expert Surveys



Three things I know about measurement



Everything is measurable*

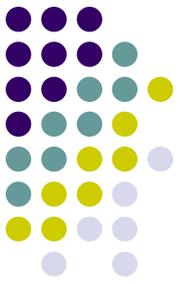


**Measuring = making a mistake
(*“true” value is intangible and
unknowable)**



Any measurement is better than none

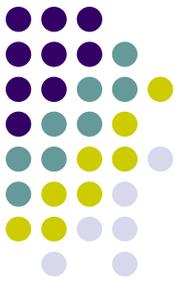
Measuring the position of political actors



Several ways to measure them

- We (mainly) focus on parties but same/similar techniques can be applied to other political actors.
- Which ones?
 - Individual politicians
 - Prime ministers
 - Party factions
 - Head of States
 - Trade unions and interest groups
 - Courts
 - ...

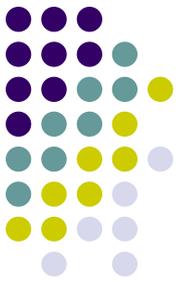
Measuring the position of political actors



Several ways to measure them

- We (mainly) focus on parties
- Which techniques?
 - **Surveys data**
 - (Mass/Elite/Experts)
 - Analysis of political texts
 - (manifestos/pledges/press releases/tweets/others written documents/speeches/...)
 - Analysis of parliamentary behavior
 - (roll call votes, cosponsorships, data on funding...)

Measuring the position of political actors



Precision: discrete/continuous/how precise (1-10; 1-100;...)

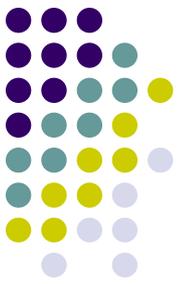
Accuracy: how measure is close to the “true” * position

Reliability: repeated measurement same results? replication

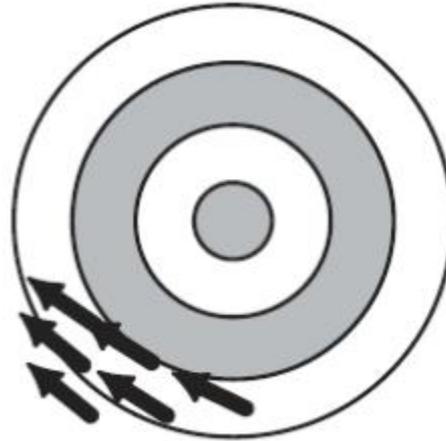
Uncertainty: how confident in the estimate? Interval rather than single point?

*what is a true party position?

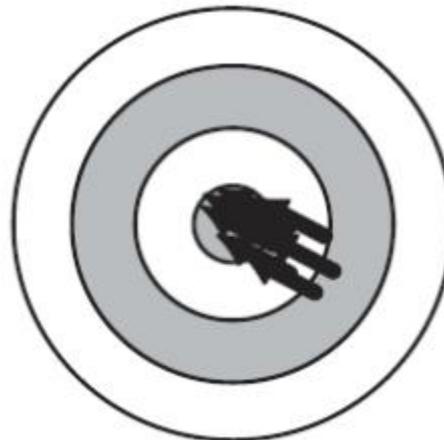
Measuring the position of political actors



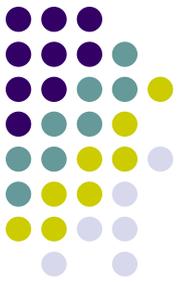
Low Accuracy, Medium Reliability



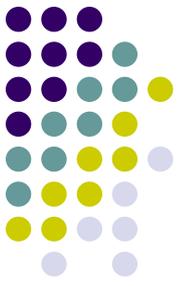
High Accuracy, High Reliability



From surveys to preferences



Mass, Elite & Expert surveys



3 types of surveys available to recover information on political actors policy positions

Mass surveys: ask to citizens!

Elite surveys: ask to politicians/candidate!

Expert surveys: ask to experts!

All of them somehow related to the concept of “Wisdom of Crowd”

Though the nature of these 3 is quite different

Mass, Elite & Expert surveys



3 types of surveys available to recover information on political actors policy positions

Mass surveys: ask to citizens!

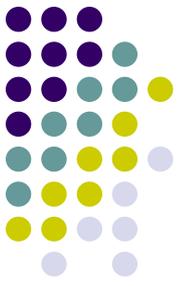
Elite surveys: ask to politicians/candidate!

Expert surveys: ask to experts!

Mass or expert surveys: they both share an **a-priori approach**, i.e., they identify ex-ante the potentially salient policy dimension(s) along which the survey will recover information

Let's start with Elite surveys

Elite surveys



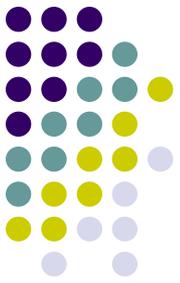
Main trouble: politicians have incentive to express instrumental non-sincere answers

Locate others on the extreme; differentiations as an artifact; lie intentionally (felt controlled)!

No answers at all: busy, or strategic
(e.g. Labor UK; Salvi DS)

High non-response rates (10%?)

Mass surveys



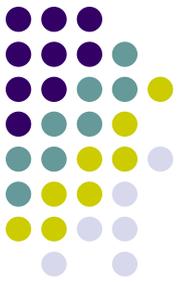
Another source of survey data to recover party positions come from mass surveys (such as the Eurobarometer or the World Values Survey or CSES)

Pro: same as expert surveys but...no experts! Usually just the left-right scale (with all the discussed problems...)

Cons: same as expert surveys

However, Mass surveys may record **perceptions** rather than actual positions

Mass vs. Expert surveys

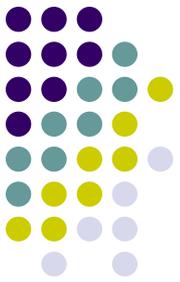


If you want to **study electoral competition and electoral behaviour**, then it could be a good idea to focus on mass surveys, given that you study the relationship between voters and parties

This avoids a “differential item functioning problem” (Alvarez and Nagler 2004) : that is, experts and voters may not see the issue space in the same way

On the other side, if you want to study the relationship between parties, than possibly expert surveys are better...or party manifestoes!

Mass/Expert surveys

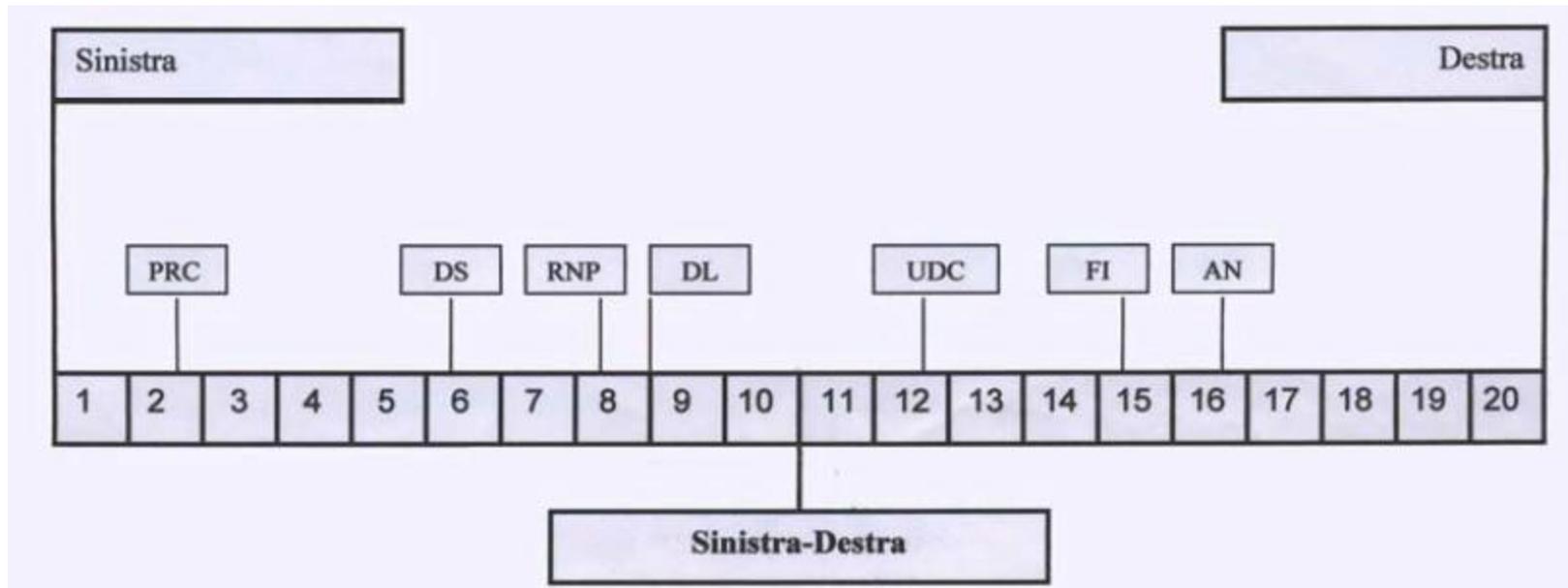
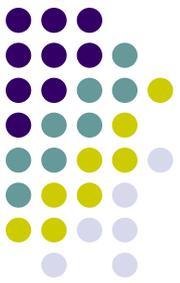


How do you make an evaluation? Based on what? What's the meaning of the scale? What is left? How extreme is left?



Now, locate yourselves

Mass/Expert surveys



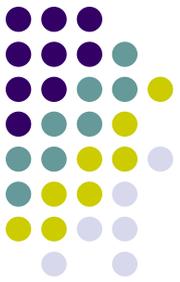
With clearer reference points things can change.

Locate yourselves now.



Does anyone change location? How many of you?

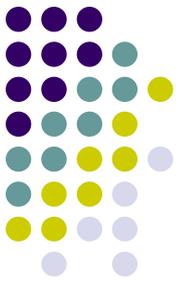
Mass/Expert surveys



Left-Right Scale		Sinistra Democratica	Partito Democratico
Clean	media	4,10	11,46
	std. dev.	1,74	3,68
Labeled	media	3,92	9,88
	std. dev.	1,37	1,82
Total	media	3,99	10,45
	std. dev.	1,51	2,74

Std. Deviation much higher when...

Expert surveys: Pros



Main one: they reflect the judgements of experts => weight and legitimacy (*better & updated(?) knowledge; less biased(?)*)

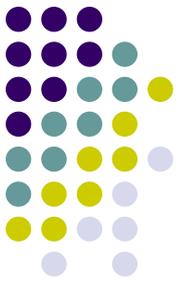
That is, expert surveys are a systematic way to summarize the judgments of the **consensus** of experts on the matters at issue...

(**wisdom** of many experts better than “1”)

...experts are asked to locate party policy positions, in the party systems of which they have expert knowledge on a set of predefined policy dimensions

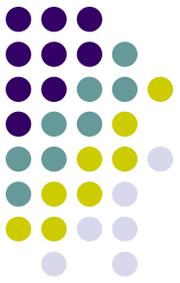
...beyond this...

Expert surveys: Pros



- It provides information on party policy positions in a **common and standardised format**
- It can be **administered at any time**, unlike manifestoes tied to electoral calendars; good in **fluid party systems**
 - E.g. splits of PDL (NCD-Alfano, CR-Fitto, ALA-Verdini)
- As long as experts are willing to respond to surveys, the expert survey methodology may probe topics that do not surface in manifestos or other data sources e.g. **internal dissent within a party**
- **Quick and easy** compared to other methods (content analysis of party electoral programs or legislative behavioural studies)

Expert surveys: Pros



- You have also a **measure of uncertainty** associated to any point estimation, so you know how much you can be confident about it!
- Example, in the German case, we have 96 answers by experts with respect to the left-right position of SPD

Expert surveys: Pros



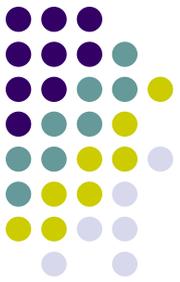
Point estimation

Standard error

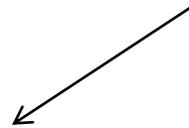
GERMANY

POLICY DIMENSION	Importance	DKP	PDS	GRÜ	SPD	FDP	CDU/CSU	Schil	Rep	DVU	NPD
<i>Vote Share 2002</i>		0.0	4.3	8.6	38.5	7.4	38.5	0.3	0.1	0.0	0.4
Left-Right	.	2.0	3.6	7.1	8.4	13.4	13.6	17.5	18.8	19.4	19.7
	.	0.23	0.22	0.22	0.18	0.20	0.17	0.17	0.12	0.08	0.07
Taxes v. Spending	15.9	1.7	3.0	11.0	9.3	18.7	14.4	14.1	10.8	.6	9.0
	0.47	0.16	0.19	0.35	0.37	0.14	0.26	0.69	0.80	0.85	0.72
Immigration	14.1	5.7	5.1	2.7	7.7	7.9	14.6	18.2	19.4	19.5	19.8
	0.54	0.67	0.36	0.25	0.29	0.39	0.33	0.24	0.13	0.12	0.06
Social	13.6	6.1	4.9	2.4	7.3	5.3	15.9	17.3	18.8	19.0	18.9
	0.64	0.71	0.33	0.15	0.26	0.30	0.25	0.34	0.17	0.21	0.29
Environment	12.8	9.8	9.1	3.2	10.9	16.8	14.5	15.8	14.4	14.6	14.7
	0.65	0.71	0.42	0.21	0.37	0.24	0.28	0.45	0.48	0.51	0.67
EU: Peacekeeping	12.7	15.4	14.2	6.6	5.5	6.7	6.6	14.6	16.7	17.1	17.3
	0.15	1.17	0.62	0.43	0.26	0.37	0.36	0.94	0.58	0.55	0.58
EU: Accountability	11.3	5.4	5.0	4.0	7.8	7.9	10.6	12.2	13.8	13.8	14.8
	0.29	1.15	0.39	0.34	0.39	0.44	0.48	1.06	1.05	1.10	1.19
EU: Authority	11.3	13.8	10.7	6.9	8.0	10.0	10.8	16.5	17.9	18.2	18.5
	0.29	0.72	0.48	0.29	0.29	0.45	0.42	0.35	0.27	0.28	0.31
Decentralization	10.4	15.4	13.6	5.4	11.7	5.9	8.5	10.5	14.3	14.9	15.4
	0.28	0.84	0.49	0.32	0.40	0.46	0.40	0.85	0.79	0.82	0.89
Sympathy	.	17.9	13.7	6.6	8.0	12.0	11.3	18.4	19.6	19.7	19.9
	.	0.41	0.53	0.42	0.41	0.50	0.42	0.31	0.11	0.08	0.07

Expert surveys: Pros

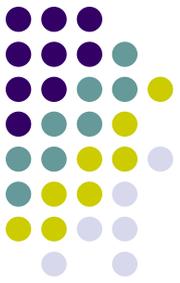


- Example, in the German case, we have 96 answers by experts with respect to the left-right position of SPD
- Average position SPD: 8.36 (st. dev. = 1.80; s.e. = .18)
- 95% confidence interval: 8.00-8.72



$$95\% \text{ CI} = \text{mean} \pm \text{s.e.} * 1.96$$

Expert surveys: Cons

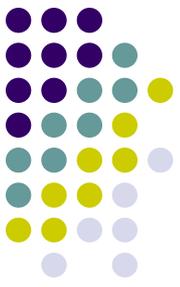


Different considerations can play a role when judging party positions. This can produce **misleading expert judgments**

Fundamental question: how do experts interpret the questions in expert surveys and how do they link substantive knowledge about parties to those questions?

What is the basis of the judgments that experts offer?

Do experts answer questions in the way they were intended?



Expert surveys: Cons

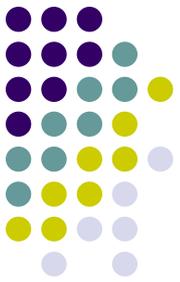
Several types of problems

What ‘party’ is being judged by the expert? - Is it the party in the electorate, the party in government or the party organization?

(E.g. M5S decision-making web or leader?)

(E.g. M5S judge left-right position mainly from economic policy or from social policy?)

(E.g. M5S position on “post-materialism” from proposal on immigrants, civil rights, or environment?)



Expert surveys: Cons

Several types of problems

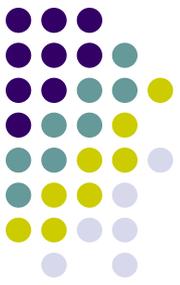
What criteria do experts bring to bear when they judge party positions? - for example, what do abstract labels like 'left' and 'right' mean to the expert?

Do experts judge the intentions of parties or their behavior?

Different access to information

What is the time frame for the judgments that we ask experts to make?

Expert surveys: Cons



Expert surveys estimates are often **too much stable**;

Do not catch shifts in policy positions... why? always based on prejudices?

Moreover: projection or rationalization problem

- An array of empirical studies argue that the estimation of party positions on the basis of **(any) survey** data is not always consistent, as respondents tend to place the parties they like **closer** to where they perceive themselves to be, and to place those parties they dislike **farther away** than their actual position would warrant – thus producing an ideological bias known as **rationalization or projection**

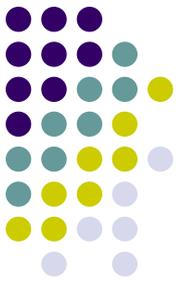
Expert surveys: Cons



Moreover: projection or rationalization problem

- In particular, **assimilation** effects refer to shortening the perceived ideological distance between oneself and those parties one favours, while **contrast** effects refer to exaggerating the distance between oneself and the parties one does not support

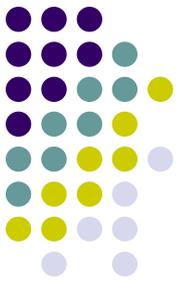
Expert surveys: Cons



Moreover: projection or rationalization problem

- Accordingly, if the subjective political views of the respondents to an expert survey **systematically interfere** with their supposedly ‘objective’ expert knowledge, then the very meaning of an expert survey – that is, experts’ answers providing indications of the (unobservable) ‘true’ spatial location of a party’s policy position – will be undermined

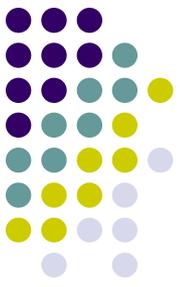
Expert surveys: Cons



Moreover: projection or rationalization problem

- Note that there is no problem if the experts share a common ideological position (more leftist or rightist)
- That is, the classic problem of a **sample bias** is not a concern in expert surveys, even if the experts we consult hold strong political preferences, **as long as** these preferences do not interfere with their expert knowledge
- It becomes a problem only if it affects their evaluation

Expert surveys: Cons

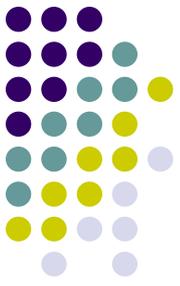


How to deal with such problems?

Solution: expert survey good questionnaire will attempt to:

- ✓ identify a more circumscribed meaning indicating precisely what judgment should concern
- for example, in evaluating the **left-right position of parties**, experts may be asked to describe what ‘left-right’ means in a particular country or what criterion they used to define this dimension
- It is a good thing when policy positions present a secure «**anchor**» whereby respondents may determine homogeneous, intersubjective frame of reference (as we will see later)

Expert surveys: Cons

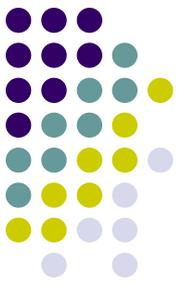


How to deal with such problems?

- ✓ specify time frames explicitly to limit variation on this dimension: **e.g.**: experts may be asked to judge the position of the party leadership on issue X during the past year

That is, the question must be designed so to put the experts in a common frame of mind so that they would be judging the same object, on the same dimension, at the same point in time

And the projection problem? Is it present? Is it relevant?
More on this later...



Expert surveys: an example

Benoit and Laver (2006) *Party Policy in Modern Democracies*

(http://www.tcd.ie/Political_Science/ppmd/)

Survey conducted in 2002-2003

47 countries (including all of Western and Eastern Europe, Russia, North America, Japan, Australia, New Zealand, Iceland, and Israel)

Largely deployed via the world wide web using the native language of the country under investigation, this survey reached more respondents than any previous expert survey of party policy positions

Expert surveys



Substantive **policy dimensions** covered in the survey included for every country a hard core of four substantive policy dimensions. These were:

- *economic policy* (interpreted in terms of the trade-off between lower taxes and higher public spending);
- *social policy* (interpreted in terms of policies on matters such as abortion and gay rights);
- the *decentralization* of decision making;
- *environmental policy* (interpreted in terms of the trade-off between environmental protection and economic growth)

Expert surveys

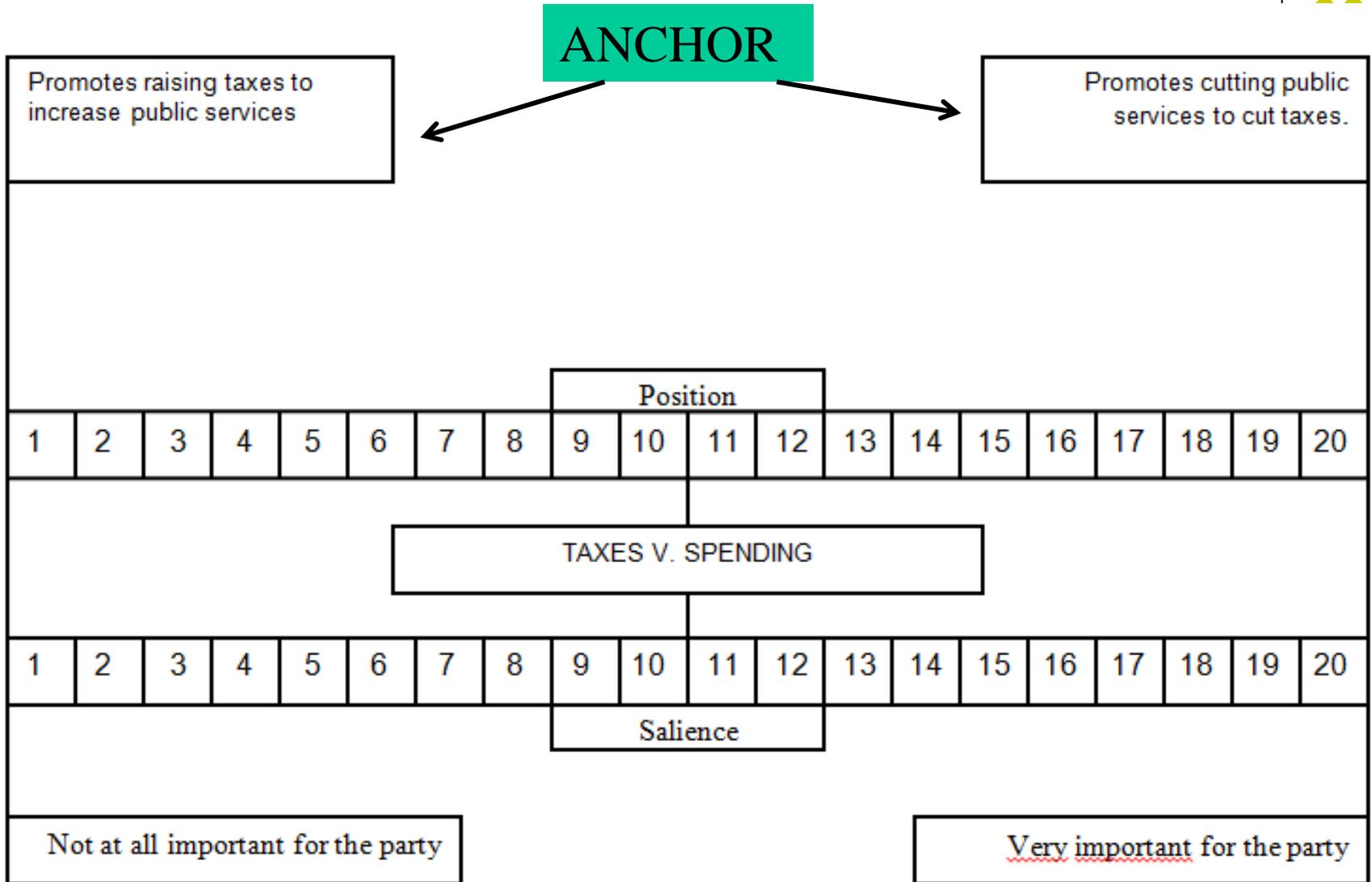


Additional substantive policy dimensions were deployed in each country, depending upon the advice of local specialists

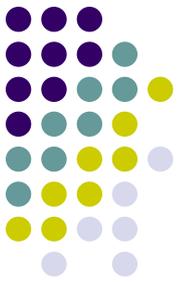
These dealt, according to local circumstance, with policy on matters such as: immigration, deregulation, privatization, religion, treatment of former communists, media freedom, EU policy, security policy, health care, and foreign ownership of land

For each substantive policy dimension, each party was placed on a scale describing its **position** (using metric of 1 to 20, with 1 generally corresponding the “left” position), but also on a scale (also 1 to 20) describing the **importance** of the policy dimension to the party in question

An example: place the PD here!



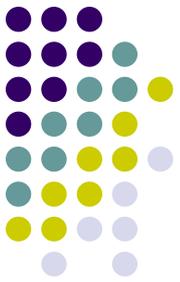
Expert surveys



In addition to estimating a set of substantive policy scales, the survey includes a direct measure of party positions on a **general left-right scale**

Leaving the precise interpretation of left and right to the respondent (...more on this later...), the general left right question asked, “*Please locate each party on a general left-right dimension, taking all aspects of party policy into account*”

Expert surveys v/ CMP



Country	Party	Party Name	Left-Right Score		Standardized Residual
			Expert Survey	CMP	
Expert Survey Says Left, CMP says Right					
AU	AD	Australian Democrats	7.8	56.6	3.47
IT	PDCI	Partito dei Comunisti Italiani	3.3	16.8	2.13
AT	Gru	The Greens	5.4	19.7	1.90
AU	ALP	Australian Labor Party	9.9	29.3	1.65
GR	SYN	Synaspismos	6.5	14.8	1.46
AT	SPO	Austrian Social Democratic Party	8.8	20.8	1.39
IL	Lab	Labor	7.5	15.2	1.31
US	Dem	Democratic Party	7.1	8.8	1.03
CA	BQ	Bloc Québécois	7.2	6.1	0.87
TR	DSP	Demokratik Sol Partisi	9.2	6.7	0.55
Expert Survey Says Right, CMP says Left					
NL	CDA	Christen Democratisch Appe'l	13.6	-1.6	-0.64
NO	V	Venstre	12.5	-7.3	-0.75
NZ	NP	New Zealand National Party	14.6	-7.2	-1.11
PT	CDS/PP	People's Party	16.9	-0.7	-1.16
ES	CiU	Convergència i Unió de Catalunya	13.7	-11.5	-1.18
LU	CSV	Christian Social People's Party	13.2	-17.6	-1.44
GR	ND	Nea Dimokratia	15.6	-11.2	-1.49
IS	X-B	Framsóknarflokkurinn	12.8	-21.1	-1.54
IL	Shas	Shas	14.4	-16.7	-1.58
ES	PP	Partido Popular	17.0	-8.4	-1.60
BE	VB	Flemish Block	18.9	-3.0	-1.63
LU	ADR	Action Comity for Democracy and Pensions	17.8	-7.9	-1.70
NZ	NZFP	New Zealand First Party	12.5	-25.2	-1.71

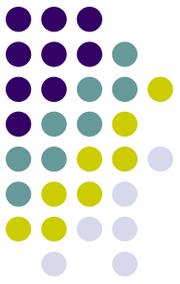
Table 4.1: Largest divergences between expert survey and CMP estimated left-right positions

US-Dem in 1997 so far from US-Rep?

Centrist perhaps?

Far-Right but... leftists elements

Projection problem



Finally, in the Benoit and Laver expert survey we have also a “*sympathy scale*” that asks experts to place all parties on a scale indicating their own closeness to each party’s (1=maximum; 20=minimum)

We can use this last answer to test for any possible respondent **bias** by checking 1) whether parties’ positions are correlated with expert personal sympathy for a party’s policies; 2) if **this correlation** has a systematic impact on the way experts give “policy scores” to parties (i.e., rationalization problem)

Experts sympathy (US)

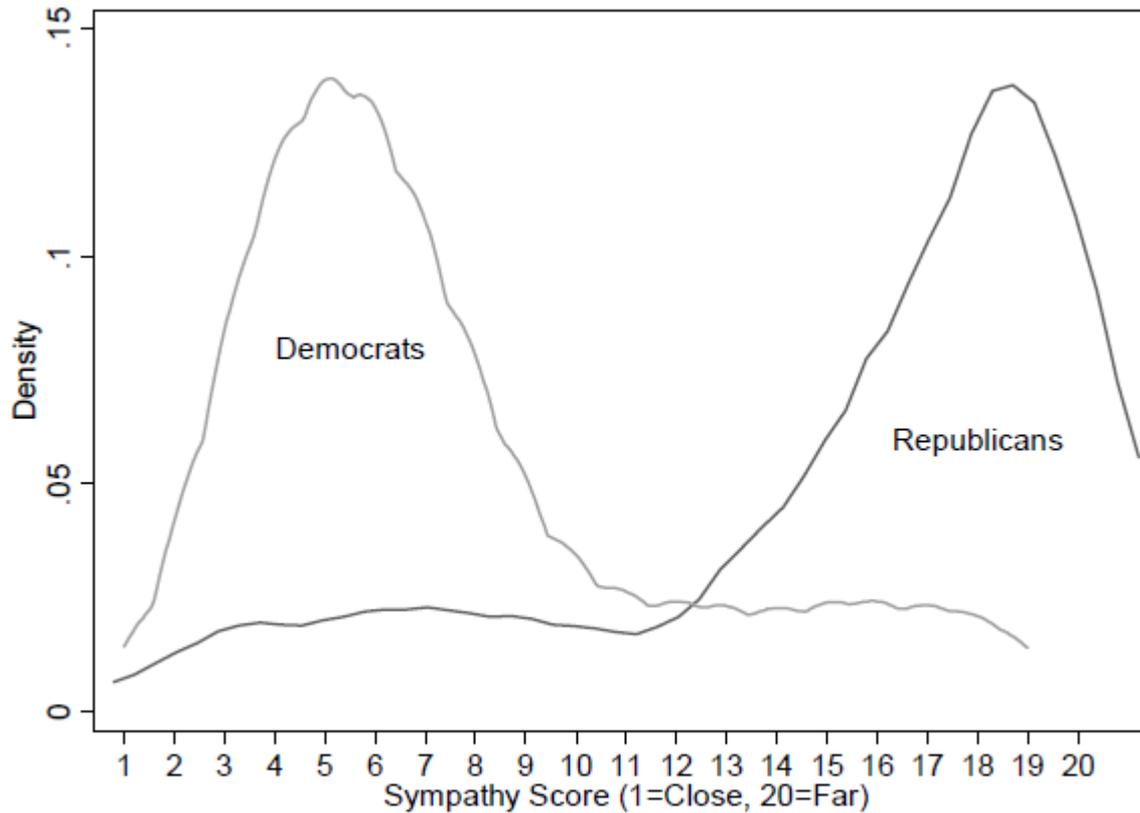
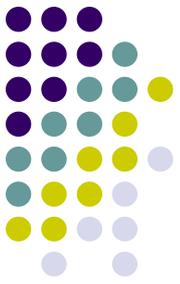
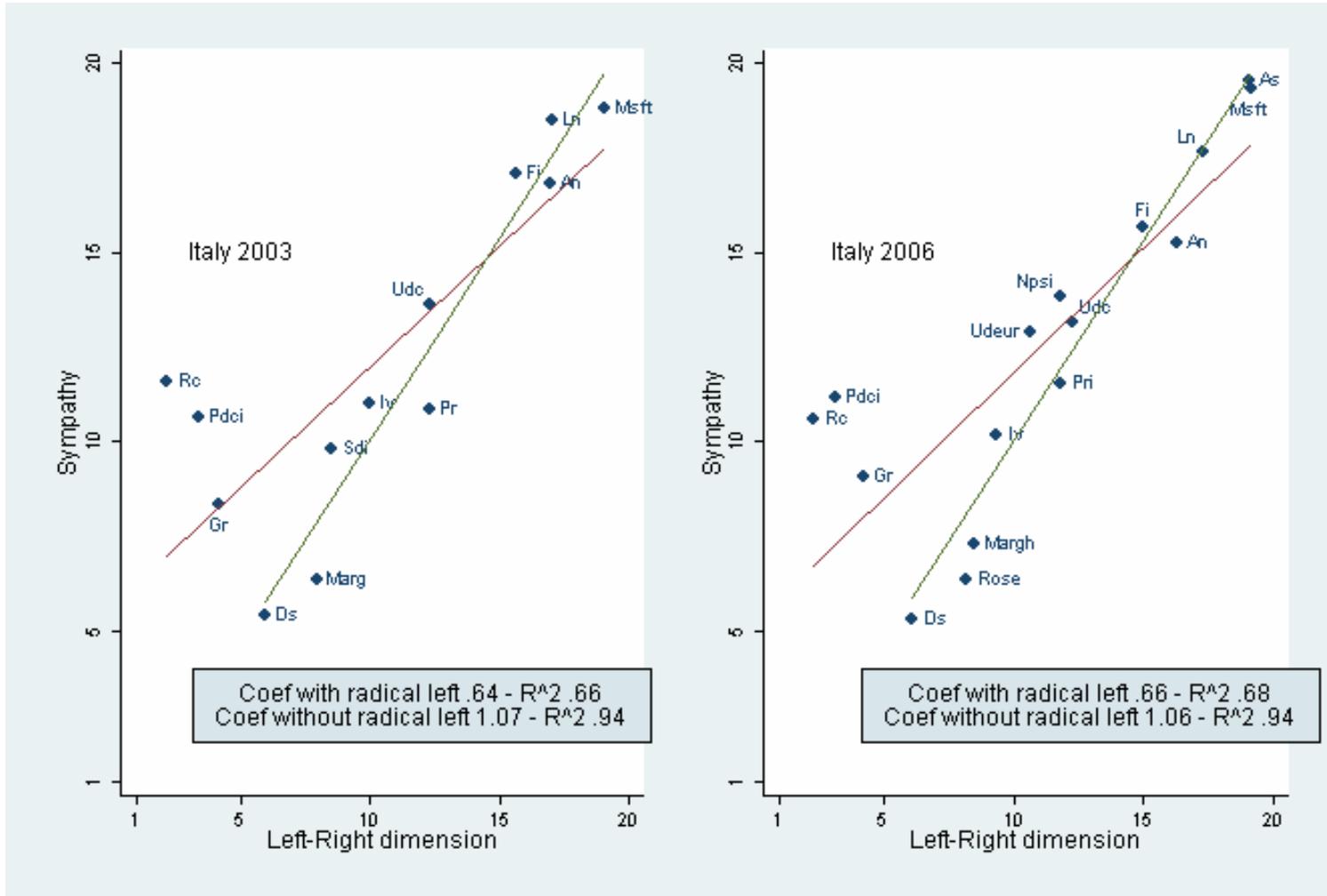
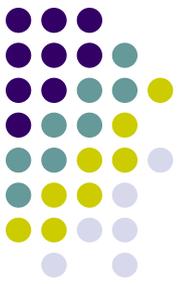
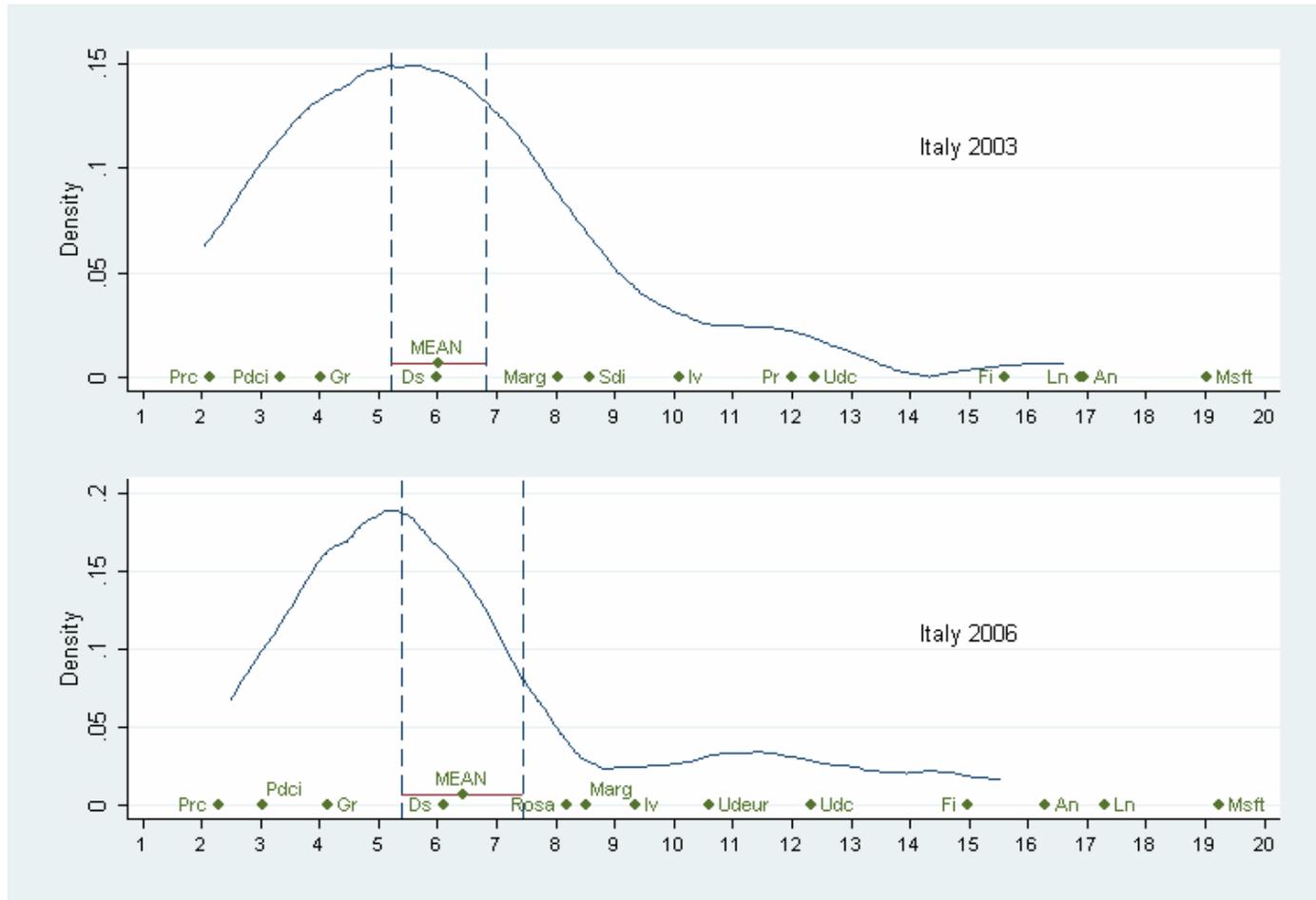


Figure 4.1: Distribution of respondent sympathy scores in the United States, $N=164$

Parties' scores and experts sympathy (Italy)



From sympathy to ideological positions of experts (Italy)

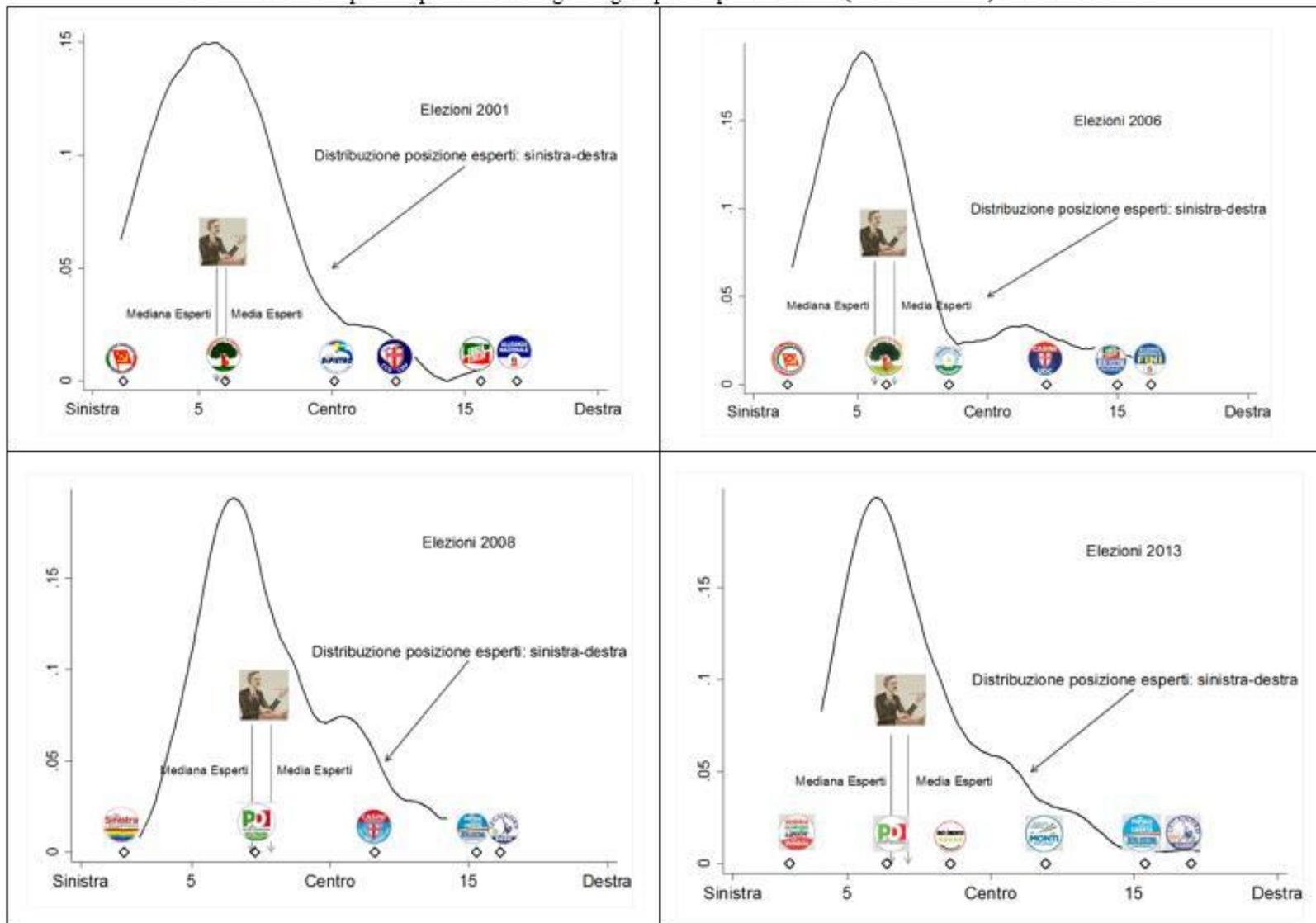


How to do that? Curini Luigi. "Experts' Political Preferences and Their Impact on Ideological Bias", *Party Politics*, 16(3), 2010, 299-321

From sympathy to ideological positions of experts (Italy)

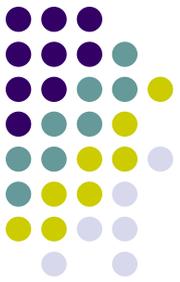


L'evoluzione nel tempo della posizione ideologica degli esperti di politica italiani (media e mediana): asse sinistra-destra

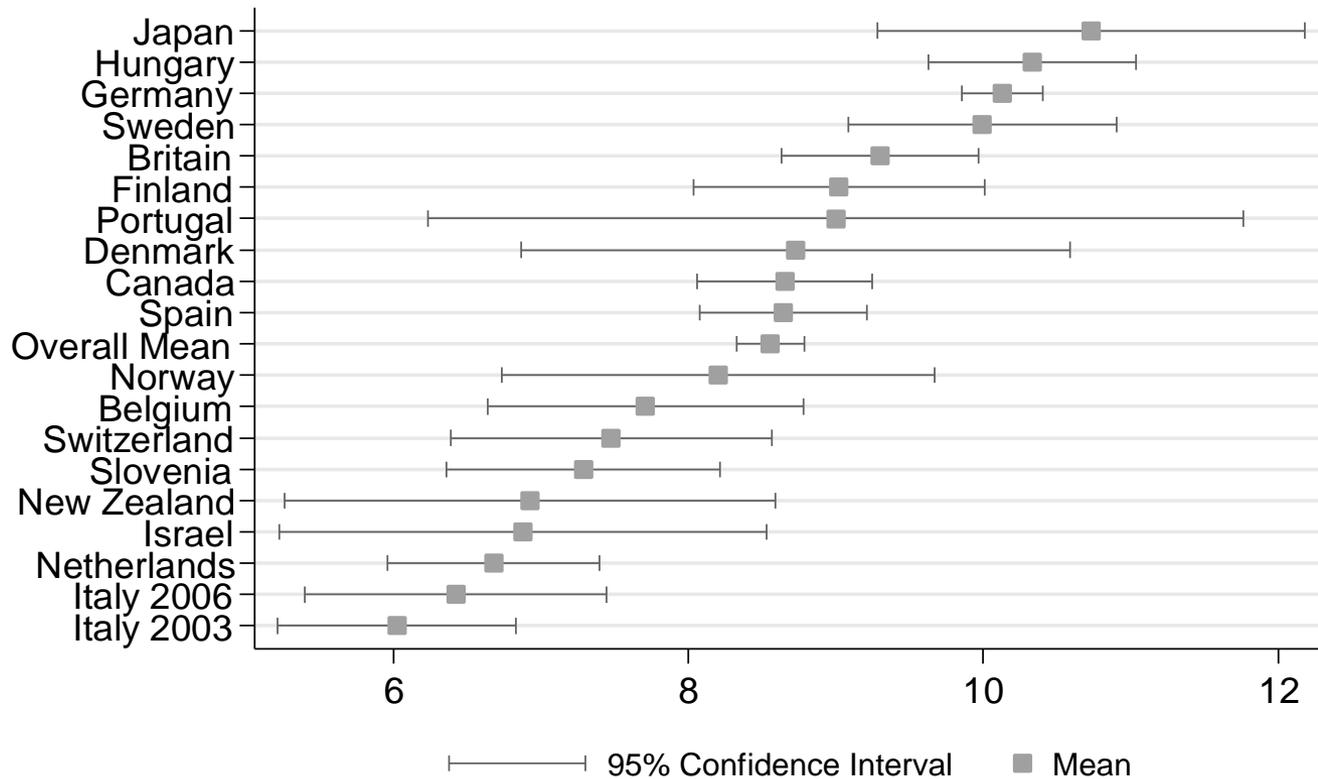


Experts all over the world!

One dimension



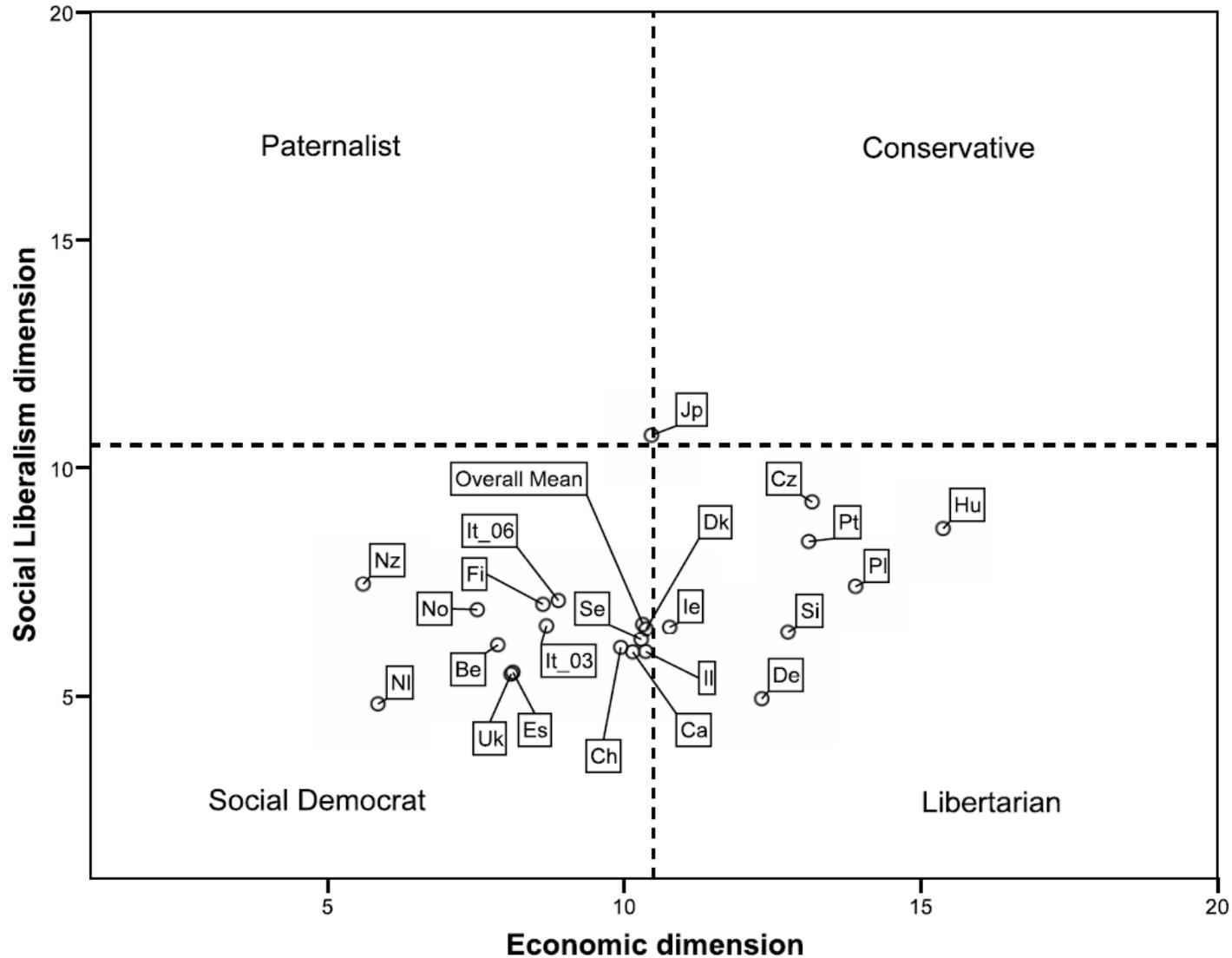
Ideological Experts' Position (estimated)



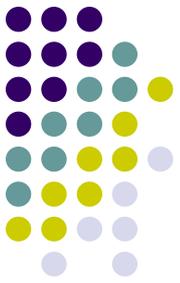
Source: Curini 2010

Experts all over the world!

Two-dimensions



Sympathy: does it matter?

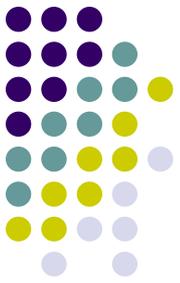


RESULTS:

on a pool of 158 observations (i.e., the number of parties surveyed), the placements of 20 parties (**12.7%**) is systematically affected by a problem of rationalization/projection

Substantive impact on parties' placement: Partido Popular (Spain – actual score: 16.99; unbiased score: 14.63); Act New Zealand (actual score: 18.16; unbiased score: 16.09)

Projection problem



The **projection bias** is far less pronounced when we pass from a label as “Left-Right” to less abstract policy dimensions

Which lesson? Once again, we should attempt to give a **more circumscribed** policy-meaning to the questions administered

Projection problem



Neutralizing the effects of ideological bias on parties' scores?

Yes we can!

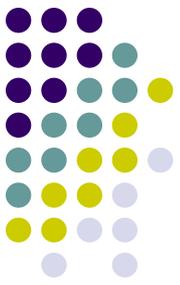
How to do that?

Curini Luigi. "Experts' Political Preferences and Their Impact on Ideological Bias", *Party Politics*, 16(3), 2010, 299-321

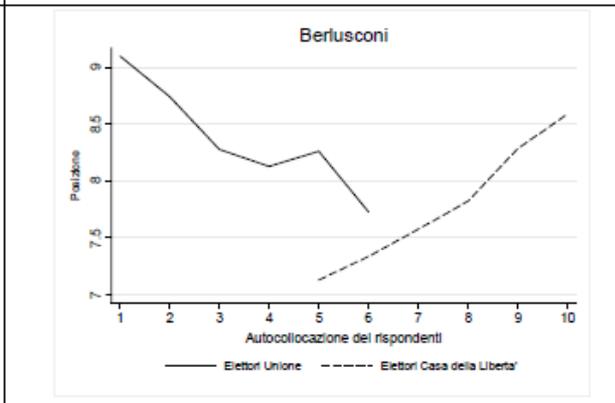
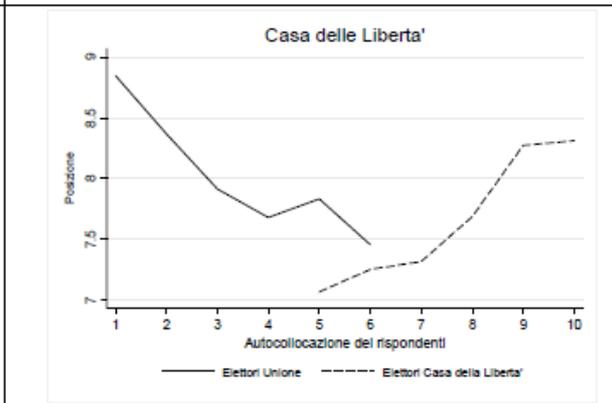
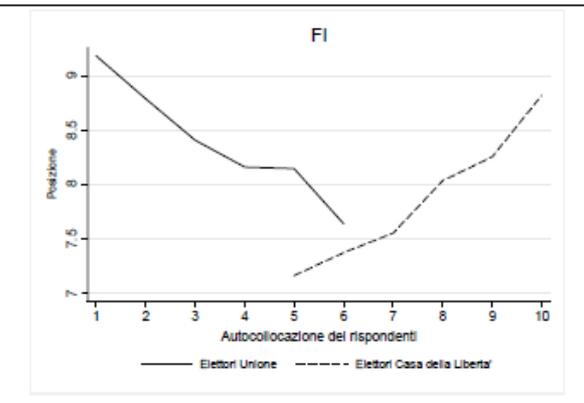
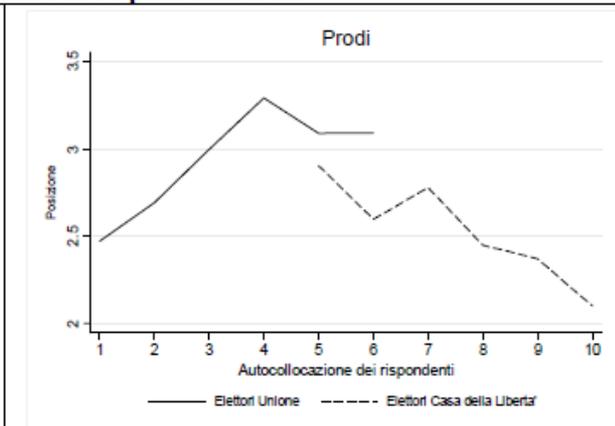
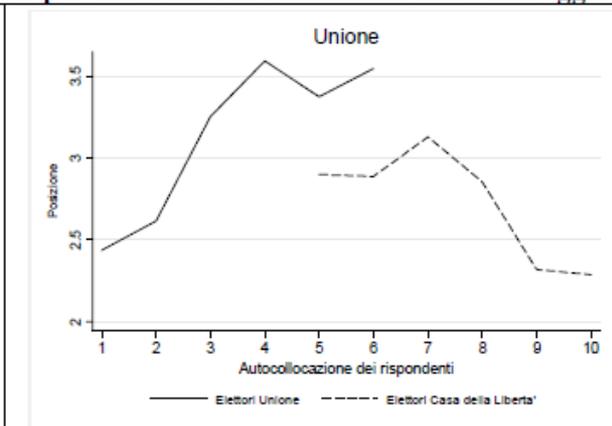
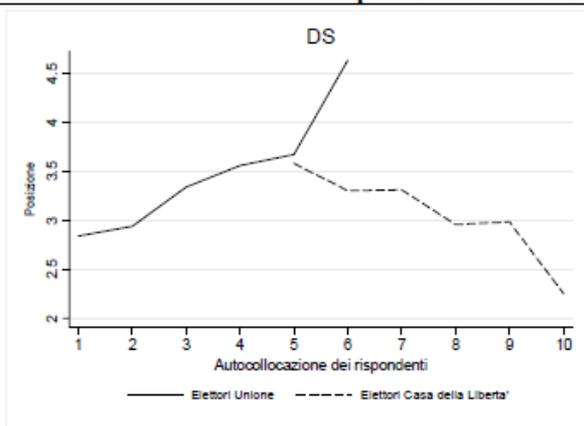
Merrill, Samuel III and Bernard Grofman (1997) 'Directional and Proximity Models of Voter Utility and Choice: A New Synthesis and an Illustrative Test of Competitive Models', *Journal of Theoretical Politics* 9(1): 25–48

Projection problem in mass-surveys?

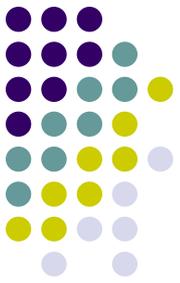
Yes we have it as well!



La variazione nella percezione del posizionamento dei due principali partiti, delle coalizioni e dei rispettivi leader a seconda dell'autocollocazione del rispondente e del suo voto per una delle due coalizioni. Fonte: sondaggio Itanes 2006 post-elettorale



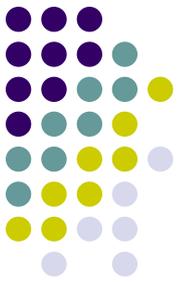
Which salient dimensions?



We need to identify which policy dimensions among the ones included in the survey are actually **salient politically in a given setting**

When measuring relative dimension salience in each country, furthermore, we must be open to the strong possibility that different political actors attach **different levels of importance** to each dimension

Which salient dimensions?



How to do that? **First option:**

To measure the overall relative importance of issue dimensions in each country, we can calculate the mean party-specific importance score for **each dimension**, **weighting scores** by the vote share received by each party

Weighting is necessary in order to avoid skewing the overall importance measures on the basis of scores for extreme or single-issue parties who might represent only a small proportion of a country's electorate

Which salient dimensions?



Dimensions: step-by-step process

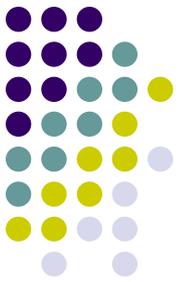
First, we compute the weighted mean saliency score for each dimension in each country

Second, the overall mean of these weighted mean scores across all dimensions is then calculated

Third, we calculate the weighted mean score of each dimension in each country, as a proportion of this overall mean. A score over 1.0 implies that the dimension is scored as more important than the mean score for all dimensions in the country; a score of less than 1.0 implies the dimension is rated as relatively less important

Let's see an example applied to the German 2005 case

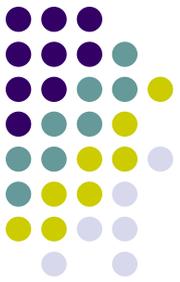
The a-priori/a-posteriori research matrix



Policy content	Number of dimensions	
	A-priori	A-posteriori
A-priori		X
A-posteriori		

Which salient dimensions?

Let's see an example of this first method applied to the
German 2002 case



Which salient dimensions?



ECONOMIC POLICY

TAXES V. SPENDING [1]

Promotes raising taxes to increase public services. (1)

Promotes cutting public services to cut taxes. (20)

SOCIAL POLICY [2]

Favours liberal policies on matters such as abortion, homosexuality, and euthanasia. (1)

Opposes liberal policies on matters such as abortion, homosexuality, and euthanasia. (20)

ENVIRONMENT [5]

Supports protection of the environment, even at the cost of economic growth. (1)

Supports economic growth, even at the cost of damage to the environment. (20)

DECENTRALISATION [12]

Promotes decentralisation of all administration and decision-making. (1)

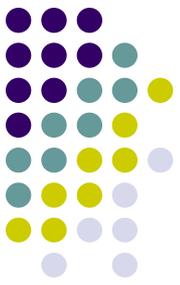
Opposes any decentralisation of administration and decision-making. (20)

IMMIGRATION [19]

Favours policies designed to help asylum seekers and immigrants integrate into _____ society. (1)

Favours policies designed to help asylum seekers and immigrants return to their country of origin. (20)

Which salient dimensions?



EU: PEACEKEEPING (EU-15 except France and Ireland) [17]

Favours _____ involvement in European security and peacekeeping missions. (1)

Opposes any _____ involvement in European military affairs. (20)

EU: ACCOUNTABILITY (EU-15 except France and Ireland) [23]

Promotes the direct accountability of the EU to citizens via institutions such as the European Parliament. (1)

Promotes the indirect accountability of the EU to citizens via their own national governments. (20)

EU: AUTHORITY (EU-15 except France and Ireland) [24]

Favours increasing the range of areas in which the EU can set policy. (1)

Favours reducing the range of areas in which the EU can set policy. (20)